

POLICY-DEVELOPMENT-Donor Privacy Policy and Bill of Rights/eBill



Process/Task: Donor Privacy Policy, Donor Bill of Rights/eDonor Bill of Rights

Department: Development

Purpose/Scope/Definition: This policy establishes Tanager's commitment to protecting the privacy, confidentiality, and appropriate use of donor information. It applies to donor and prospective donor information collected, maintained, accessed, or used by Tanager Place and the Tanager Place Endowment Foundation.

The policy establishes expectations for the collection, use, access, disclosure, and protection of donor information; honoring donor communication preferences; and maintaining transparency regarding Tanager's donor privacy practices. It also affirms Tanager's commitment to the Donor Bill of Rights and applicable standards related to donor privacy and stewardship.

Responsibility:

Position Responsible:	Philanthropy Director
Backup Responsibility:	Development Department
Approval Authority:	Tanager Board
Effective Date:	
Review Frequency:	Annually
Last Reviewed Date:	
Revision Dates:	

The designated Tanager representative(s), and their back-up personnel, shall be responsible for compliance with this Operational Guide.

Procedure:

Donor Privacy

For the purpose of this policy, "Tanager" refers to the legal entities of Tanager Place and the Tanager Place Endowment Foundation.

Tanager is committed to respecting the privacy of our donors. Tanager will not sell, rent, trade or share donor information or lists with unrelated third parties for their own marketing or solicitation purposes. Tanager does not send out mailings on behalf of other organizations. Information may be disclosed to authorized service providers or advisors when necessary to conduct Tanager business, subject to appropriate confidentiality and data-security requirements.

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Donor Information

Tanager collects and maintains the following types of donor information when it is voluntarily provided:

- Contact information such as name, address, telephone numbers (including cell phone), and e-mail address.
- Demographics that allows Tanager to effectively recognize and acknowledge donors and ensure messaging is most relevant to each donor.
- Giving information, giving history, and connections with other organizations that is publicly available.
- Information regarding attendance and participation at events.
- Information provided by the donor in the form of comments and suggestions (examples may include interests, hobbies, and relationships).

Confidential donor information is maintained in Tanager's approved systems and records, including the donor database. Access to the database is only provided to the essential individuals needing access to carry out their essential job duties and may be shared with staff, board members, volunteers and consultants only on a confidential and need-to-know basis. Donor information is used to analyze overall giving patterns in order to make more accurate budget projections, as well as to understand donors' interests in our mission and to update them on the organization's plans and activities.

Discontinuing Contact

It is the policy of Tanager to communicate with donors according to their expressed preferences whenever possible and when preferences are known.

Tanager will discontinue or change the method used to contact any person upon that person's oral or written request directed to the organization, its professional fundraiser, or other designated agent. Upon a person's (or a person's verified authorized representative's) request that Tanager discontinue further contact, the person's profile will be promptly modified in the Tanager donor databases to ensure no further fundraising or marketing communications inconsistent with the donor's stated preference will occur.

Donor Transparency

Tanager shall provide a clear, prominent, and easily accessible privacy and Donor Bill of Rights on any of its websites that explains:

- What information, if any, is being collected about them and how this information will be used.

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- How to access personal information collected and request correction.
- How to inform Tanager that one does not wish his/her personal information to be shared outside the organization
- What security measures Tanager has in place to protect confidential donor information.

Donor Bill of Rights

Tanager subscribes to the Association of Fundraising Professionals' [Donor Bill of Rights](#).

eDonor Bill of Rights

The eDonor Bill of Rights is intended to complement the original document and provide further and more detailed guidance for the new world of online giving. In addition to the rights outlined in the Donor Bill of Rights, online donors should demand the following of their online solicitors:

- To be clearly and immediately informed of the organization's name, identity, nonprofit or for-profit status, its mission, and purpose when first accessing the organization's website.
- To have easy and clear access to alternative contact information other than through the website or email.
- To be assured that all third-party logos, trademarks, trustmarks and other identifying, sponsoring, and/or endorsing symbols displayed on the website are accurate, justified, up-to-date, and clearly explained.
- To be informed of whether or not a contribution entitles the donor to a tax deduction, and of all limits on such deduction based on applicable laws.
- To be assured that all online transactions and contributions occur through a safe, private, and secure system that protects the donor's personal information.
- To be clearly informed if a contribution goes directly to the intended charity, or is held by or transferred through a third party.
- To have easy and clear access to an organization's privacy policy posted on its website and be clearly and unambiguously informed about what information an organization is gathering about the donor and how that information will be used.
- To be clearly informed of opportunities to opt out of data lists that are sold, shared, rented, or transferred to other organizations.
- To not receive unsolicited communications or solicitations unless the donor has "opted in" to receive such materials.

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Related Policies/SOPs/Operation Guides:
