

## **Donor Privacy Policy**

To support the high quality programs and services of The Heat and Warmth Fund (THAW), the organization relies on contributions from individuals, foundations, and corporations. Due to our high regards for our donors and a mutual respect for THAW's mission, we have created a Donor Privacy Policy to ensure that all donors' personal and financial information is protected. All gift transactions (online, mail, phone, in-person) with THAW are covered by this policy and are conducted over secure portals. Access to this data is password-protected and limited to authorized THAW employees.

### **Donor Information**

THAW collects and maintains the following types of donor information:

- Contact information, such as: name, address, telephone number, email address
- Giving information, including payment details
- Information on event/program participation and resource request
- Information provided by the donor in the form of comments and suggestions

This confidential information is kept in a secure database and is maintained to comply with 501(c)(3) and IRS regulations, in addition to specific grant reporting requirements. It is also used to track and analyze donor data, to inform donors about upcoming events, activities, giving opportunities, and gift acknowledgments; and to provide tax-receipts for gifts. Select information is shared with appropriate staff, board members, volunteers and consultants only on a confidential and need-to-know basis.

### **List Sharing**

THAW does not sell, rent, trade, or share its donor list with any other organizations. In addition, it does not send out mailings on behalf of other organizations to donors.

### **Discontinuing Contact Upon Request**

It is the policy of THAW to communicate with donors according to their expressed preferences whenever possible. THAW will discontinue or change the method used to contact any donor upon that donor's oral or written request directed to the organization, its development staff, or other THAW representative.

THAW shall maintain a record of all requests by donors who indicate to THAW or its affiliated agents, that they do not wish to be contacted by or on behalf of The Heat and Warmth Fund.

This policy does not prohibit contact by an individual or group voluntarily soliciting on behalf of The Heat and Warmth Fund, even if the donor being contacted has requested

to be placed on the “do not contact list”. For example, an outside organization (fraternal organization, church, school, workplace etc.) may choose to organize a fundraising event for THAW. THAW does not control the solicitation efforts of outside organizations and donors on the “do not contact list” could potentially be contacted in this circumstance.

Upon a donor’s (or a donor’s authorized representative’s) request that The Heat and Warmth Fund discontinue further contacts, the donor’s name and address will be promptly modified in THAW’s donor database to ensure that no further contact is made with the donor.

Permanent Record: THAW will maintain an electronic record of requests for discontinuance of contacts, effective with the adoption of this policy. Oral requests will be noted in writing by THAW staff and permanently recorded in the electronic donor database. The records of persons who have made such a request will be maintained by THAW to the extent necessary.

### **Changes to Privacy Policy**

The Heat and Warmth Fund may occasionally update this policy to keep current with technology changes, regulatory changes or donor feedback. Please check this page occasionally to ensure you are familiar with any changes.

### **Third Party Websites**

This website contains links to other websites. Please refer to their privacy policy as The Heat and Warmth Fund is not responsible for the privacy policies or practices of any third party.

### **Donor Bill of Rights**

THAW subscribes to the Donor Bill of Rights, which was created by the Association of Fundraising Professionals (AFP), the Association for Healthcare Philanthropy (AHP), the Council for Advancement and Support of Education (CASE), and the Giving Institute.

#### The Donor Bill of Rights

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the nonprofit organizations and causes they are asked to support, we declare that all donors have these rights:

I. To be informed of the organization’s mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended

purposes.

II. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.

III. To have access to the organization's most recent financial statements.

IV. To be assured their gifts will be used for the purposes for which they were given.

V. To receive appropriate acknowledgment and recognition.

VI. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.

VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.

IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share

X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.