

Piscataquis Regional Food Center Donor Confidentiality Policy

The Piscataquis Regional Food Center (PRFC) recognizes that the efficient operation of the organization requires the maintenance and management of donor and prospect records. These records may contain sensitive information that has been shared with or developed by the organization staff or volunteers on a confidential basis. ("Records" is construed to mean all files, including electronic data, containing information on donors or prospective donors to the Organization.) Donors and prospects may be attracted to the Organization on the basis of its ability to assure temporary or permanent anonymity. Protecting donor confidentiality is an essential part of providing good service to donors. Additionally, care must be taken to preserve the confidentiality of discussions that take place and information that is shared in the course of conducting Organizational operations.

The purpose of the policy is to codify the position of PRFC on confidentiality.

- I. Confidentiality of Records:** PRFC is responsible for the confidentiality of donor and prospect records, as well as fund information. Records will normally be available to staff as needed to fulfill their duties. At the discretion Executive Director, staff may make all or part of any record available to Organization volunteers to assist them in executing their specific responsibilities. The Organization's auditors, legal counsel and other contractors are authorized to review donor/prospect and fund records as required for the purposes for which they are engaged. All persons accessing donor/prospect or fund records in the conduct of Organization business shall maintain the confidentiality of said records. Staff may share information with donors, fund beneficiaries, and grantees pertaining to their own gifts, funds, grants, etc. Except in those instances, any copies of confidential information shall not be held outside the Organization's office for extended periods, and are to be destroyed as soon as possible.
- II. Publication of Donor Names:** Unless otherwise requested by the donor, the names of all individual donors may be printed in the Organization's annual report and in other appropriate listings. The Organization will not publish the amount of any donor's gift without the permission of the donor. Unless otherwise specified in the document, donors making gifts to the Organization by bequest or other testamentary device are deemed to have granted such permission.
- III. Memorial/Tribute Gifts:** The names of donors of memorial or tribute gifts may be released to the honoree, next of kin, or appropriate member of the immediate family, unless otherwise specified by the donor. Gift amounts are not to be released without the express consent of the donor.
- IV. Anonymous Gifts:** The Executive Director is authorized to accept anonymous gifts to the Organization, and to handle them appropriately.

- V. Giving Categories:** If giving categories have been stipulated for a specific fund drive, challenge grant, or project, or as part of the Organization's ongoing recognition program, then the donors, unless they otherwise specify, are deemed to have given permission for the Organization to publish their names associated with the particular giving category. Similarly, the Organization may publish giving categories associated with donor names in its annual report, and unless a donor specifies otherwise.
- VI. No Disclosures to Third Parties:** The Organization shall not release to third parties or allow third parties to copy, inspect or otherwise use Organization records or other information pertaining to the identification of a donor or donor's fits. No disclosures to third parties of such information, including addresses and demographic information shall be made without the donor's consent.
- VII. Confidentiality of Organization Business:** Discussions that take place in the context of the Organization's operations require discretion, including discussions pertaining to grant making, personnel issues, development activities, operation fundraising, investment management, etc. The positions or statements of individual board members, advisors, or staff should not be discussed outside of official Organization meetings and processes. Likewise, the content of Organization business, including documents or Organization analysis of documents, should not be discussed or shared outside official meetings and processes.
- VIII. Discussion of Information:** Confidential information about clients, their families and friends will not be discussed for any reason except on a need-to-know basis.
- IX. Public Disclosure:** The Organization will comply with both the letter and spirit of all public disclosure requirements, including the open availability of its Form 990 tax returns. This Confidentiality Policy shall not be construed in any manner to prevent the Organization from disclosing information to taxing authorities or other governmental agencies or courts having regulatory control or jurisdiction over the Organization. However, all staff, volunteer, and contractors must hold strictly confidential all information of a private nature, including, but not limited to, all items explicitly discussed in this policy.
- X. Consequences of Policy Violation:** Violations of the Confidentiality Policy are considered very serious, and may result in disciplinary action, up to and including dismissal for employees or contractors, or removal from the Board or any committee for volunteers.