

## **ONLINE DONOR PRIVACY**

### **POLICY:**

It is the policy of ADEC to accept in-kind donations and monetary donations that support its mission and to account for them in accordance with the highest ethical and fiscal standards.

ADEC will be in full compliance with Internal Revenue Service regulations concerning the receipt of tax-deductible contributions. Any program area receiving a donation on behalf of ADEC will notify the responsible Donor Developer, under Community Advocacy and Outreach. An acknowledgment will be sent within three days of the receipt of said donation on behalf of ADEC.

Any staff member who receives a contribution or payment in response to an agency-related speaker's presentation must turn that donation over to Donor Development on behalf of the organization.

ADEC will also comply with current financial reporting standards, Statements of Financial Accounting Standards – SFAS, as issued by the Financial Accounting Standards Board (FASB) of the American Institute of CPAs.

ADEC shall classify contributions received by type of donor-imposed restriction (unrestricted, temporarily restricted or permanently restricted) in compliance with SFAS No. 116 - Accounting for Contributions Received and Contributions Made. In addition, ADEC also recognized the valuation of “In-Kind” Donations.

ADEC reserves the right to decline acceptance of any gift not meeting its operational needs.

Responsible: VP Community Outreach  
Latest Rev: 1/7/2021

Approved:

**PURPOSE:** To ensure donor privacy and that online monetary donations and in-kind donations accepted by ADEC are properly accounted for and acknowledged.

**SCOPE:** To reduce the risk and ensure the integrity of funds to continue as ongoing donations for ADEC, there are established set of policies establish and assign responsibility and authority for the fundraising functions and activities and overall receipt and cultivation of donor contributions.

- Policy 1.4.1 – Fundraising on Behalf of ADEC
- Policy 1.4.2 – Media Release for ADEC Purposes – Individuals Served
- Policy 1.4.3 – Monetary and In-Kind Donations to ADEC
- Policy 1.4.4 – Online Donor Privacy

ADEC donor contributions procedures and practices are to be compliant with applicable legal, regulatory, confidentiality, and reporting requirements. This may include valuing donations according to guidelines, annual tax filings and documentation provided to donors.

### **PROCEDURES:**

All information regarding donations to ADEC should be coordinated through Donor Development, under Community Outreach and Advocacy.

- Has responsibility and oversight to ensure that all donor contributions fit into the larger organizational structure and requirements for reporting.
- Has access to appropriate training for collecting and reporting and cultivating donor methods and practices that match the needs of the agency as well as the demographics of the surrounding communities and keeps current on the best-practice trends and methods to secure on-going donors.

### **Gifts Received On-line**

1. Donations are submitted through the ADEC website on a form generated by Blackbaud and run through the Blackbaud merchant account. Donations are connected to Raiser's Edge automatically.
2. The Donor Developer will approve and process all online gifts through Online Express in Raiser's Edge.
3. The Donor Developer will approve donations submitted through Blackbaud's Just Giving's website/platform.
4. Donors will receive a thank you in the mail within seven (7) days of their gifts being processed, following same as with gifts of money received through the mail or manual check and/or currency.
5. Donors who give large gifts receive a handwritten thank you from the Donor Developer with gifts over \$500 may receive a special acknowledgement from the President / CEO.
6. Documentation of online gifts are given to the Finance Department with all other deposit documentation for that day.
7. Donations received via social media platforms (e.g. Facebook, etc.) will be received in Finance Department. Donor Developer will retrieve a report of said donations from the department.

### **Confidentiality**

ADEC assures that confidentiality will be maintained in all aspects of fundraising efforts, including unsolicited donor contributions as noted in Policy 1.4.3.

- All donor information is deemed 'property' of ADEC and cannot be marketed, given, 'sold' or shared with other organizations.

- ADEC employees are prohibited from using donor information for own personal uses or gains and use for personal gain may lead to disciplinary actions including termination of employment.
  - ADEC utilizes third-party software, Raiser’s Edge, as the primary platform for donor data. This is held and managed on ADEC’s secured information technology platform, such as the L: Drive, with shared folders exclusive to the Community Outreach and Advocacy group.
    - i. Donor data may include name, email address, phone numbers, donation amounts and other descriptions.
  - ADEC will maintain the confidentiality of donor specific data in accordance with applicable laws and regulations, such as HIPPA, and the donor wishes, such as a donor who wants to remain anonymous.
  - ADEC fundraising documentation is kept separate from all other administrative and financial recordkeeping.
- ADEC shall follow rules and regulations of the Internal Revenue Service regarding receipting of donations and their use.
- Donors are to be made aware and can opt-out of ongoing solicitation, communication, recognition and confidentiality.
  - ADEC will communicate, as appropriate (email, social media, phone, etc.) with donors, and will inform with overall “Donate on Website” the intent for regular solicitations or updates on program needs.
  - ADEC will also respond to donor requests to opt-out, discontinue, or restart communication with a donor and how it will maintain the currency of its records used for communications, such as relocation or death of a donor in Raiser’s Edge.
  - ADEC may take such actions as:
    - i. Provide in written appeals, at least annually, a means, such as a check off box, for both new and continuing donors to inform ADEC they do not want their name and address shared outside the organization, and
    - ii. Provide a clear, prominent and easily accessible privacy policy on [www.adecinc.com](http://www.adecinc.com) how donor information is secured and protected.
- ADEC does receive unsolicited monetary and in-kind donations and the same procedures and protections are followed.
- Assure that appropriate disclosure of financial condition of the organization and use of donated funds is made to donors upon request and through means such as public distribution of ADEC’s Annual Report.

