Alpha Delta State Ohio Educational Foundation (ADSOEF)

DONOR PRIVACY POLICY

OPERATING POLICY

Effective Date: 06/14/2021

Review Date(s): 03/20/2023; 05/19/2025; 05/18/2026; 10/19/2026

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I. PURPOSE

The Board of Directors (BOD), committee members, and fundraising/activity volunteers are committed to respecting the privacy of donors.

II. DONOR INFORMATION

A. The BOD lists donors' names in the ADSOEF Report for the Annual Meeting.

1. Names of donors who wish to remain anonymous are not listed.

2. This Report is printed for Annual Meeting attendees and appears on the ADSOEF website.

3. Personal identifying information or the gifting information of donors is not made public, nor is this information shared with third parties.

B. The BOD collects the following donor information:

1. name, mailing and email addresses, phone numbers and personal preferences;

2. each donation made and the date of the Treasurer's acknowledgement;

3. the program service fund(s) each donor supported;

4. hardcopy contribution forms and envelopes are retained by the Treasurer for three (3) years per ADSOEF Documents Retention and Destruction Schedule Procedures.

C. The BOD uses donor information to

1. send receipt letters to donors for tax purposes;

2. thank donors personally and inform them that their gift was set to work as they intended;

3. inform donors about giving options;

4. acknowledge donations made *in memory of* or *in honor of* a particular individual or group;

5. update donors of ADSOEF's plans and successes.

III. SECURITY

A. QuickBooks

Donor information is recorded in the BOD Treasurer's QuickBooks for Nonprofits program. The Intuit QuickBooks website describes the many layers of security, privacy, surveillance, and protection from the elements such as flood, smoke, or fire.

B. Backup Service

The BOD Treasurer uses an online backup service for all financial and donor information available in QuickBooks records.

C. Confidentiality

BOD, committee chairs and members, and volunteers adhere to principles and practices contained in the ADSOEF Confidentiality Policy.

D. Cybersecurity

BOD, committee chairs and members, and volunteers adhere to principles and practices contained in the ADSOEF Cybersecurity Policy.