



# DONOR DATA CONFIDENTIALITY POLICY & AGREEMENT

This policy shall become effective on March 22, 2016

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MHS has established the following Donor Data Confidentiality Policy Guidelines (“Policy” or “Guidelines”) to ensure that there is a common understanding regarding use of the Data gathered in the process of establishing, developing, and maintaining Donor relationships. This policy is designed to work in concert with MHS’ Donor Privacy Policy, which represents our public commitment to Donors to safeguard the privacy of their information.

## 1. Effective Date

These Policy Guidelines shall become effective March 22, 2016.

## 2. Definitions

- a. “Public Source” means any information of a non-confidential nature that is publicly available, either through internet search means, information service subscription, or materials created and sent to members of the public (e.g., annual reports, letters to members, etc.) that have not been deemed confidential to the organization distributing the information.
- b. “Private Source” means information gleaned through conversations about personal relationships, or any other non-public source. For purposes of Section 2 (c) below, Private Source information excludes first-hand personal knowledge independently acquired.
- c. “Donor” for purposes of this Policy means any individual (or company) who (that): currently contributes money, good or services; has contributed money, good or services in the past; or has been identified as a possible contributor of money, good or services in the future.
- d. “Data” means all information, financial and non-financial, pertaining to a Donor, a Donor’s family, a Donor’s business, and a Donor’s capacity.
- e. “MHS Personnel” for purposes of this Policy means all Board members, paid staff members, and any volunteers who assist in the donation management process.
- f. “Confidential” means that information is exchanged only on a “need to know” basis for the purpose of furthering MHS mission, and shared only with MHS Personnel who have a common understanding and commitment to MHS’ Guidelines.

### 3. Guiding Principles

All MHS Personnel will:

- a. Adhere to all guidelines set forth in MHS's Donor Privacy Policy, referenced herein.
- b. Respect requests for source confidentiality, even within MHS and among other MHS Personnel;
- c. Never use Private Source information for purposes other than furtherance of MHS mission, which includes both situations of personal gain and use on behalf of other organizations;
- d. Use good judgment in revealing the extent of personal information acquired so that neither Donors nor sources are ever uncomfortable with interactions with MHS;
- e. Maintain Data in a confidential manner, either in a password-protected donation management database or in physical Donor files to which there is restricted access; and
- f. Record any and all personal information in a respectful fashion.

### 4. Situations Not Contemplated by this Policy

Should situations be encountered that are not covered by the Guidelines outlined within this Policy, it is expected that MHS Personnel will act in a manner that demonstrates ethics and integrity and protects the reputation of MHS, its relationship with supporters, and the privacy of Donors and information sources.

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#### Policy Acceptance:

By signing this document I am agreeing to the terms and conditions herein and will abide both in practice and in spirit by the requirements outlined in this Policy. I understand that accepting this Policy is a condition of working with MHS' donation management process, and that the data discussed within the context of my work with MHS belongs to MHS and will remain confidential both during my active involvement with MHS and if or when I am no longer actively involved in the donation process. No information gained as a part of this process may be shared with others not bound by the same agreement either now or at any time in the future.

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Signature

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Date

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Printed Name