

# **KMC Foundation**

## **Donor privacy and confidentiality policy**

Your trust and confidence are important to us. The purpose of this policy is to state the position of the KMC Foundation on donor confidentiality and donor anonymity and will guide the actions of the Board of Directors, the KMC Foundation President and staff and committee members who may serve the Foundation, regarding the rights of donors and potential donors to confidentiality regarding their transactions with the Foundation. The KMC Foundation recognizes that the operation of the Foundation requires the maintenance and management of extensive donor and prospect records. Donor records often contain sensitive information that has been shared with or developed by Foundation staff on a confidential basis. "Records" means all files, including electronic data, containing information on donors or prospective donors to the Foundation. Information about donors and donations is handled with respect and confidentiality. Employees and volunteers of the KMC Foundation are not permitted to use this information for any purpose other than to carry out the services they are performing for the benefit of the KMC Foundation.

## **Policies**

### **Confidentiality of records**

The KMC Foundation President shall be responsible for maintaining the confidentiality of donor and prospect records and will ensure that all staff have clear direction regarding the confidentiality of records through the establishment of appropriate operating procedures. He/she may, in his/her discretion, make all or part of any record available to staff members or volunteers if essential to them in executing their responsibilities. Disclosure decisions will honor the wishes of donors related to disclosure unless a larger legal issue is related. The KMC Foundation will not sell, share, or trade your personal information for third party fundraising or marketing purposes. The KMC Foundation does not sell its mailing lists.

### **Donor Anonymity and confidentiality**

**Confidentiality and the anonymity (identity of an anonymous donor) of donor/prospect records will follow the following policy:**

**The KMC Foundation Board of Director's and KMC President's may need to review donor/prospect records to carry out its responsibilities, therefore, donor/prospect records may be shared. They shall respect the Foundation's significant interest in protecting the sensitive nature of those records and shall maintain these policies for donor confidentiality and anonymity.**

**The KMC Foundation President requires written request for approval from any “Internal/President Level and above” individual or group requesting the disclosure of donor/prospect records and/or the identity of an anonymous donor. His/her approval must be granted before such records are released. No “External /Below President Level” individual or group will have donor/prospect records disclosed with confidential or anonymous restrictions.**

**All staff with permissions to access the donor database are required to sign a Confidentiality Statement and will receive the Donor Bill of Rights, the AFP Code of Ethical Standards, and the AHP Statement of Professional Standards and Conduct and agree to abide by the guidelines and principles of these three standards in all actions and work as a representative of KMC Foundation.**

The Foundation’s auditors are authorized to review donor and prospect records as required for the purposes for which they are engaged. Gift agreements are considered “strictly confidential information” and are not public documents. Particulars of a gift agreement will not be shared with the general public unless the donor has granted permission to do this.

## **Publication of donor names**

The names of donors may be listed in the Foundation’s annual report, on the website and/or in similar public relations communications. Exceptions will be made for any donor who specifically requests anonymity.

The Foundation will not publish the specific amount of any donor’s gift without the permission of the donor.

Donors making gifts to the Foundation by bequest or other testamentary device are deemed to have granted such permission, unless otherwise noted.

## **Honor/memorial gifts**

The names of donors of memorial or honor gifts may be released to the honoree, next of kin or individual(s) designated by the immediate family, unless otherwise specified by the donor. Gift amounts are not to be released without express consent of the donor.

## **Kinds of information**

The Foundation defines “personal information” as information that can be used to distinguish, identify or contact a specific individual. It does not include publicly available information such as business contact information, names, addresses and telephone numbers as published in public sources, such as telephone directories. Credit card information is handled by a secure third party host and used only to process payment initiated by a person contacting the KMC Foundation. This information is not stored by the KMC Foundation.

## **How we use it**

The Foundation collects, uses and discloses personal information concerning our donors for the following reasons:

- To establish a relationship and communicate with donors
- To understand who our donors are and how we may improve our services to meet their preferences and expectations
- To process a donation (e.g. a credit card transaction)
- To issue a tax receipt
- To recognize contributions
- To meet requirements imposed by law

## **How we protect your information**

Kettering Medical Center Foundation strictly adheres to the "Health Insurance Portability and Accountability Act of 1996 (HIPAA)– Privacy Rule.

**If you have questions about this policy, please contact Rick Thie, President, Kettering Medical Center Foundation at 937-395-8607, [rick.thie@ketteringhealth.org](mailto:rick.thie@ketteringhealth.org)**