

Planned Giving Donor Confidentiality Policy

The American Rose Society (ARS) strongly supports protecting the privacy of its donors and the confidentiality of information concerning them. Donor records, both hard copy and electronic, and other donor information will not be sold and will not be shared with other organizations. As described below, the identity of planned giving donors, but not the amount of their donations, will be published periodically unless the donor has specifically requested anonymity.

Access to donor information, on a need to know, case by case basis, is limited to the Executive Director, the Development Officer, and staff members and volunteers who acknowledge donations or solicit donations. All ARS staff and volunteers must maintain the confidentiality and privacy of donors and may not divulge donor information.

This policy guides the actions of the Board of Directors, the Executive Director, staff and volunteers who serve ARS and helps to ensure the confidentiality of donors and potential donors regarding their all transactions with ARS.

PROCEDURES:

Confidentiality of Records:

The Executive Director is responsible for maintaining the confidentiality of current donor and prospective donor records and will ensure that each staff member and volunteer has clear direction regarding the confidentiality of records.

The Executive Director may, at his or her discretion, make all or part of any donor record available to staff members or volunteers if it is essential for them to carry out their responsibilities. Any such decision will honor the wishes of donors related to disclosure unless a larger legal issue is involved.

Publication of Heritage Member Names:

The names of living individuals who have notified the ARS that they have included the ARS in their planned giving will be listed in public relations communications as ARS Heritage Members, unless the donor has specifically requested anonymity. Although the donor names will be published, the amounts of the anticipated gifts will not be published or disclosed.

Anonymous Gifts:

The Executive Director is authorized to accept anonymous gifts to ARS. Acceptance of restricted gifts is subject to the provisions of the ARS gift acceptance policy as set forth in the ARS Gift Policy Manual.

Distribution of Policy:

The Donor Confidentiality Policy will be posted on the website of ARS and will be available to anyone upon request.

Donor Bill of Rights

ARS endorses and will adhere to the Donor Bill of Rights, which was created by the American Association of Fund Raising Counsel (AAFRC), Association for Healthcare Philanthropy (AHP), the Association of Fundraising Professionals (AFP), and the Council for Advancement and Support of Education (CASE). It has been endorsed by numerous organizations and reads as follows:

The Donor Bill of Rights

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the nonprofit organizations and causes they are asked to support, we declare that all donors have these rights:

- I.** To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- II.** To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- III.** To have access to the organization's most recent financial statements.
- IV.** To be assured their gifts will be used for the purposes for which they were given.
- V.** To receive appropriate acknowledgement and recognition.
- VI.** To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
- VII.** To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- VIII.** To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
- IX.** To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
- X.** To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.