

UUFSD Policy and Procedure Document**Policy ID: 590****Title: Donor Information Security and Confidentiality**

Date Approved: March 21, 2017 by the Board of Directors

Updated: February 12, 2023 by the Board of Directors

Purpose

To specify the method by which the confidentiality of donor information is protected from disclosure, thereby assuring donors that information about their donation is handled with respect and with confidentiality to the extent provided by law.

Policy

UUFSD shall provide a secure environment for collecting donations and shall maintain internal controls governing the safekeeping of all donor financial and personal information. Information concerning all transactions between a donor and UUFSD shall be made available only to UUFSD personnel with a need to know in the performance of their official functions. Otherwise, such information shall be held by UUFSD in strict confidence and may be disclosed only with the permission of the donor or the donor's designee.

Procedure

Every activity ("Activity") that involves the solicitation of monetary donations (e.g., the Pledge Drive, the Capital Campaign) is charged with maintaining the security/confidentiality of donor financial information. Therefore, everyone engaged in the Activity is responsible for maintaining confidentiality when discussing or reporting donor information.

- Unless exceptions are approved by the Board, only the Activity Chair, the Treasurer, the Minister, the Congregational Administrator, and the Bookkeeper may view individual donor names and contributions.
- Donation records will be maintained in a secure location by the Congregational Administrator. Once the Activity is completed, all transactions and records related to the Activity are the responsibility of the Congregational Administrator.
- When requested for analysis (e.g., measuring the overall effectiveness of a pledge drive or understanding general pledge patterns), the Treasurer shall provide access to anonymized relevant donation data. Nominally, this access is restricted to members of the Board of Directors, the Finance Committee, the Stewardship Committee, the Planned Giving Committee, and those involved in the Capital Campaign. Other requests are to be handled on a case-by-case basis with authorization from the Minister or President of the Board of Directors.
- UUFSD records are increasingly kept in secure online locations. Those who are responsible for maintaining those assets are expected to maintain the security and

confidentiality of donor information records and are also expected to refrain from viewing individual donor names and contributions unless required to do so because of their other responsibilities.