

UUFSD Policy and Procedure Document
Policy ID: 590
Title: Donor Information Security
Date Approved: March 21, 2017 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 maintaining internal controls governing the safekeeping of all confidential 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

Monetary Donation Activities

Every activity ("Activity") that involves the solicitation of monetary donations (e.g., the Pledge Drive, the Capital Campaign) is charged with maintaining the security 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.
- The Congregational Administrator shall provide donation details, with the names of donors redacted, to anyone that requests it for analytical purposes (e.g., measuring the overall effectiveness of a pledge drive or understanding general pledge patterns).