

External Requirements Procedure: Policy on Donor Privacy and Discontinuing Contact

1. Purpose

The purpose of this policy is to protect the privacy of current and prospective donors to Homeward Bound, Inc. (HBI); establish standards for the collection, use, and disclosure of donor information; provide donors with access to and control over their personal information; and ensure that requests to discontinue contact are honored.

2. Responsibility

- a. The Board of Directors of HBI (BOD) and the Foundation Board of Directors (Foundation BOD) are responsible for adopting and amending this policy.
- b. The Chief Executive Officer (CEO) has overall responsibility for administering and interpreting this policy.
- c. The CEO may delegate the day-to-day implementation of this policy, including the development and revision of related procedures, to the Vice President of Development or to another person deemed qualified.

3. Reservation of Rights

The BOD and the Foundation BOD reserve the right to amend this development policy at any time by adding, deleting, or revising the existing policy. Although this development policy is intended to be as comprehensive as possible, it is not all-inclusive, as circumstances that cannot reasonably be anticipated may arise.

4. Application

This policy applies to all HBI employees and to professional fundraisers, service providers, or other agents acting on HBI's behalf.

5. Standards

- a. HBI will respect and protect the privacy and confidentiality of information concerning current and prospective donors.
- b. HBI may collect donor information necessary to process and acknowledge donations, maintain donor records, communicate with donors, recognize contributions, and support HBI's fundraising and stewardship activities. Donor information may include names, mailing addresses, email addresses, telephone numbers, donation and transaction information, communication preferences, recognition preferences, and other information voluntarily provided by the donor.

- c. HBI may collect donor information through donation forms, HBI's website, mail, telephone calls, email, events, meetings, and other communications with donors. HBI may also receive donor information from payment processors, service providers, referrals, and lawful public sources.
- d. HBI may use donor information to process and acknowledge donations, provide receipts, maintain accurate records, communicate information about HBI's mission, programs, events, and giving opportunities, recognize donors according to their preferences, respond to donor requests, and meet applicable legal, accounting, and reporting requirements.
- e. HBI will not sell, trade, rent, or share donors' private information with other organizations. HBI may disclose donor information to service providers acting on HBI's behalf when necessary to perform authorized services, at the donor's direction or with the donor's consent, or when disclosure is required by law. Service providers acting on HBI's behalf are expected to use donor information only for purposes authorized by HBI.
- f. Donors may request access to their personal information maintained by HBI and may request correction of inaccurate or outdated information. Donors may also request changes to their communication or recognition preferences or request that their name, gift information, or other private information not be made publicly available.
- g. HBI will discontinue contact with any person upon receiving an oral or written request from that person or the person's authorized representative. A request may be made directly to HBI or to a professional fundraiser or other agent acting on HBI's behalf.
- h. HBI will maintain a record of all requests to discontinue contact. Oral requests will be documented in writing and retained with written requests.
- i. Upon receiving a request to discontinue contact, HBI will promptly remove or modify the person's information in its records to prevent further unsolicited contact. HBI will also take reasonable steps to ensure that the person's information is removed or appropriately identified in external databases or records maintained on HBI's behalf.
- j. A request to discontinue contact does not prohibit HBI from responding to a subsequent inquiry initiated by the person or the person's authorized representative. HBI's communication will be limited to responding directly to the inquiry and will not result in removal of the person's do-not-contact designation.
- k. HBI will retain records of requests to discontinue contact for as long as it is reasonably necessary to ensure that such requests continue to be honored.

1. Donors may contact HBI to access or correct their personal information, change communication or recognition preferences, request that their private information not be made publicly available, request that HBI discontinue contact, or ask questions regarding donor privacy.

Requests may be directed to:
Homeward Bound, Inc.
12805 Highway 55, Suite 400
Plymouth, MN 55441
Email: info@hbimn.org
Telephone: 763-525-3186

- m. HBI will make this policy available on its website and upon request.