

Big Brothers Big Sisters of Central Ohio
Donor Confidentiality and Integrity Procedure and Protocol
Development Department

With respect to our donors, Big Brothers Big Sisters of Central Ohio (BBBSCO) adheres to the Donor Bill of Rights developed by the Association of Fundraising Professionals. In brief, these rules of engagement state that our donors have a right to information regarding our mission and capacity to use their investment, board members and their professional relationships, and recent financial statements. Donors have the right to be assured that their gifts will be used for the agreed upon purpose, to receive appropriate acknowledgment and recognition, that their personal information will be handled with confidentiality, that they will be treated professionally, have an opportunity to be removed from any mailing list, and receive honest and prompt responses to questions.

It is the policy of the Development Department that private information about donors and prospects will only be shared with the board and key volunteers, and only along with a verbal or written discussion regarding confidentiality.

Only Development Department Staff will have access to the Development Drive. Any other staff members or interns will need to be authorized by the VP of Resource Development. Currently, in addition to the Development Staff, the AVP of Marketing and PR has access to the Development Drive.

The same is true for Donor Relationship Management platform on Salesforce. Staff are instructed to set complicated usernames and passwords to access Salesforce.

Each Development Staff member keeps their door locked whenever they are away from their desk.

Credit Card numbers are handled with care by the Development Department and the following procedures are adhered to:

- The Database Coordinator retains original copies of any slips or forms that contain credit card information. If copies are to be made for other members of the Development Team, the credit card number will be blacked out.
- Any credit card information that is taken over the phone should be transcribed onto the official form for this purpose. The original should be given to the Database Coordinator.
- Whenever credit card information must be shared between the Development Department and the Finance Department, a hard copy is used—the credit card number is never emailed.
- Old financial records that may contain credit card numbers are locked securely or shredded after the appropriate time period.