



## DONOR CONFIDENTIALITY

### **POLICY**

All communications with donors and information concerning donors and prospective donors shall be held in strict confidence by the Archdiocese of Miami, all its parishes, schools and entities and their employees and volunteers. Donor information shall not be released unless permission is first obtained from the donor.

All archdiocesan employees and volunteers with access to donor information must sign confidentiality agreements prior to gaining access to donor information.

### **PURPOSE**

The purpose of the donor confidentiality policy is to ensure prudent and discreet use of all information pertaining to individuals and organizations that have contributed, pledged, or are prospects for gifts to the Archdiocese of Miami and/or any of its parishes, schools, and entities

### **DONOR INFORMATION**

Records of all private gifts, grants, pledges, and planned gifts to the Archdiocese of Miami are maintained by the Development Office. Records of all private gifts, grants, and pledges made to parishes, schools and entities in the Archdiocese of Miami shall be maintained by the parish, school and/or entity that received and acknowledged the gift. All planned gift records shall be maintained by the Archdiocese of Miami for any and all planned gifts received by parishes, schools and entities within the Archdiocese. It is the responsibility of those who keep and use these records to protect the privacy of donors to the fullest extent possible, except when the donor's approval has been secured to announce a gift, pledge, etc., publicly. Release of donor information to outside entities is prohibited without the permission of the donor. The Development Office, or any entities within the Archdiocese of Miami, will neither trade nor sell any donor information to outside individuals or organizations. Constituents' rights to inactivate their donor records and to be excluded from mailings are honored and systems are updated in accordance with their requests.

Records, files, profiles and other material gathered or produced by the Development Office in relation to actual or prospective donors are to be held in strict confidence by the Development Office and its staff.

Information in regard to specific private gifts, grants, pledges, or expectancies is released to outside agencies only under legal subpoena, with the approval of legal counsel, or with permission from the donor.

Employees of the Archdiocese of Miami, including its parishes, schools and entities, who violate policies in regard to confidentiality may be subject to disciplinary action up to and including dismissal.

Initial: May, 2013  
Current: May, 2024