

CENTER ON BUDGET AND POLICY PRIORITIES CONFIDENTIALITY & PRIVACY POLICIES AND PROCEDURES

The following Confidentiality and Privacy Policies and Procedures were developed by the Center on Budget and Policy Priorities and adopted by the Center's Board of Directors. This set of policies and procedures formally documents our policies for ensuring the privacy and confidentiality of information the Center utilizes in carrying out its development activities.

Donor Privacy Statement

The Center on Budget and Policy Priorities respects the privacy of our donors. We protect personal information. We do not rent, sell or trade our mailing lists. Name, address and other information provided by a donor will be used appropriately to provide information on Center activities including new research, status of policy debates, special events, or fundraising needs and to acknowledge donations. If at any time a donor wishes to not be acknowledged or to receive less mail or wishes to be removed from any of our communications they can do so by contacting us by phone at 202 408-1080 or via e-mail at: Greenberg@cbpp.org and we will gladly accommodate the request.

Confidentiality Statement

The Center strongly believes in protecting the privacy of our philanthropic donors and prospective donors and the confidentiality of information concerning them. Donor records and other donor information are highly confidential and protected by organizational policy. The use of information for political or commercial purposes is strictly prohibited. Appropriate action, including but not limited to actions that may lead to termination of employment, will be taken against persons, or entities that violate these policies. Any individual, institution, or agency deemed to have violated these policies, or deemed to have jeopardized the confidentiality or privacy of any individual or organization affiliated with the Center by the inappropriate use of information provided in accordance with these policies will not be permitted access to information in the future.

Professional Standards and Privacy Practices

All employees of the Department of Development and External Affairs will read and abide by the Center's Confidentiality Policies and Procedures, the Association of Professional Researchers for Advancement's (APRA's) ethics guidelines, and the "Donor Bill of Rights" developed by the Association of Fundraising Professionals (attached). These documents can be obtained from the Department of Development and External Affairs and will be automatically provided to new department employees, and members of senior management, board members or other volunteers

who are engaged in fundraising activities. They also can be found in the Department of Development and External Affairs's Procedures Manual.

All development staff, as well as senior managers and volunteers that have access to restricted information will be required to sign the Center's Confidentiality Agreement. Restricted information includes donor giving histories, personal, financial, and/or legal information that is publicly available and collected during the prospect research process or provided by the donor or prospect himself/herself. Safeguards are in place to ensure that the information is not disclosed or shared more widely than is necessary to achieve the purpose for which it was gathered. We also take measures to ensure the accuracy/integrity of this information is maintained

Donors are provided with an opportunity to be anonymous and to request that their name and/or the amount of their gift not be publicly released. Donors who request anonymity, either for gifts or for themselves, will be publicly acknowledged as "anonymous." Information on anonymous donors will be flagged prominently as "anonymous" in all paper files and computer records.

Individual Donor Records

Individual Donor records, whether in hard copy or electronic form, are the property of the Center on Budget and Policy Priorities. These records contain specific information pertaining to those individuals important to the development efforts of the Center. Individual Donor records are kept in the office of the Director of Development and External Affairs in a secure desk or file drawer that will be locked outside of normal work hours.

Information kept in development records must be relevant to the goals of the Development Department. It is the responsibility of each Development staff member, senior manager, board member, or volunteer to submit only appropriate and relevant information for inclusion in files. Credit card numbers will be blocked out when they are no longer necessary. If any credit card numbers are found on former correspondence in a file, they should be blocked out immediately.

Access to the donor database (Raiser's Edge) is maintained and authorized by the Director of Development and External Affairs. Security procedures are in place to ensure that different users' have access to only those screens that are necessary to carry out their Center business.

In general, restricted or sensitive donor information will not be provided via email. However, in those cases where it is necessary (ie. due to time sensitivity or other unforeseen reasons), Center staff will use all possible cautions to protect confidentiality.

The Finance and Administration Office, as well as external auditors and any regulatory agency personnel and people operating pursuant to legal process that may be conducting audits, reviews, or other investigations, may require access to all hard copy and electronic files in the development records in order to conduct their work.

Information Requests from External (Non-Center) Sources

External sources requesting information such as the media may be given access to public or published information at the discretion of the Director of Development and External Affairs. Only public information will be released and only if **not** coded "anonymous" "no contact" or "unlisted".

Proprietary restricted information such as research profiles, action reports, financial records and giving histories will not be released under any circumstances unless consent is provided by the donor. All media requests related to donors are forwarded to the Director of Development and External Affairs.

Outside consultants and vendors such as direct mail firms, mailing houses, publication publishers, and database screening firms, will be bound by this confidentiality policy and confidentiality provisions will be included in contracts to such entities.