POLICY ON CONFIDENTIALITY OF DONOR RECORDS
AND DONOR ANONYMITY

General: Santa Barbara Neighborhood Clinics (SBNC) recognizes that the efficient operation of the development office requires the maintenance and management of extensive donor and prospect records. These records often contain sensitive information that has been shared with or developed by the SBNC staff on a confidential basis.

The purpose of this policy is to codify the position of SBNC on anonymity and donor/prospect records. “Records” is construed to mean all files, including electronic data, containing information on donors or prospective donors to SBNC.

I. Confidentiality of Records: The Director of Development shall be responsible for maintaining the confidentiality of donor and prospect records. She may, in her discretion, make all or part of any record available to staff members or SBNC volunteers to assist them in executing their responsibility. SBNC will not sell, trade or share a donor's personal information with external sources nor send donor mailings on behalf of other organizations unless expressly granted specific permission to do so.

SBNC's auditors are authorized to review donor and prospect records as required for the purposes for which they are engaged.

The Board of Directors may, by a majority vote, appoint a committee to review the donor/prospect records and report back to the Board. Any such committee shall respect SBNC's significant interest in protecting the sensitive nature of those records.

II. Publication Of Donor Names: Unless otherwise requested by the donor, the names of all individual donors will be listed in SBNC's annual report and/or in other appropriate vehicles. SBNC will not publish the amount of any donor's gift without the permission of the donor. Donors making gifts to SBNC by bequest or other testamentary device are deemed to have granted such permission.
Donors should be aware that it is SBNC's policy to, from time to time, publish the current market value of its funds, from which a reader may be able to determine the approximate size of a donor’s gift.

III. **Honor/ Memorial Gifts:** The names of donors of memorial or honor gifts may be released to the honoree, next of kin, or appropriate member of the immediate family, unless otherwise specified by the donor. Gift amounts are not to be released without the express consent of the donor.

IV. **Anonymous Gifts:** The Director of Development is authorized to accept anonymous gifts to the Foundation. In the event the Director of Development is uncertain about the desirability of accepting an anonymous gift, she shall consult with the Chief Executive Officer.

The Chief Executive Officer shall disclose to the Board Executive Committee, upon a request by a majority of the Executive Committee, the names of any anonymous donors.

V. **Disclosure of Pending Gifts:** In the event that the Director of Development concludes that SBNC is likely to receive, in the immediate future, a gift equal to or greater than five percent of its then existing assets, the Chief Executive Officer shall notify the Chair of the Board. The Chair and the Chief Executive Officer shall determine the appropriate course for notifying the Board of Directors.

I affirm that I have read and agree to abide by this Policy on Confidentiality of Donor Records and Donor Anonymity.

___________________________
Signature

December 6, 2012
Date