

# **DONOR PRIVACY POLICY**

## **Merrick, Inc.**

### **1.0 PURPOSE**

It is important that the Company maintain a secure environment to retain donor financial information and to protect the privacy of such donor information.

### **2.0 APPLICATION**

The policy applies to all members of the Board of Trustees, employees, and volunteers when acting as a representative of Merrick, Inc., (hereinafter “the Company”).

### **3.0 POLICY**

It is the policy of the Company to safeguard donor information, and disclose its privacy policies and use of donor information on the Company’s website. At this time, it is the policy of the Company to use donor information only for Company purposes including: fundraising, work procurement, community outreach, public policy advocacy, and to promote the Company’s interests, products, and services. Although the Company does not currently share or make available donor names, addresses, or email information to third parties for marketing purposes, the Company allows donors to opt out of such information sharing.

### **4.0 PROCEDURE**

- 4.10 The Company shall take reasonable steps to ensure the integrity and confidentiality of personally identifiable information provided by donors in person, by mail, by telephone, or online. Because electronic transmissions via the Internet are not absolutely secure from interception, the Company will publish a privacy policy on its website and disclose to website users that the Company cannot guarantee the security or confidentiality of such transmissions.
- 4.20 In the event that the Company accepts online credit card donations, the Company will use industry standard security measures and encryption technology to reasonably safeguard such information. The Company will only contract with third party services or vendors for purposes of online donation that meet such standards and similarly take reasonable steps to protect donor credit card and other financial information provided as part of that service.
- 4.30 When a credit card, personal check, or securities (donation of stocks and bonds) are used to make a donation, the Company will only use information necessary to complete the specific transaction contemplated. Such information may not be used by the Company, employees, or agents for any purpose other than to complete the transaction intended by the donor and for purposes of financial accounting and legal recordkeeping by the Company. Documentation containing personal financial information (e.g., credit card information, account numbers, etc.) will be stored in a locked cabinet or locked bank storage bag when not in use. Once the transaction and all associated reporting and recordkeeping has been completed, the Company will ensure the secure destruction of such documentation.
- 4.40 The Company shall maintain a database of personal contact information (postal and email addresses, name, telephone and association with Merrick (e.g., business partner, vendor, volunteer, client family, friend of the Company) regarding donors and other friends of Merrick. The Company shall allow such persons to restrict Merrick’s ability to disclose such information

to third parties for marketing purposes (“opt out”). As detailed in the Company’s “*Mail & Discontinuation of Contact Procedure*”; upon a person’s, or their authorized representative, request that Merrick, Inc., discontinue further contacts, the person’s name and address will be promptly modified in the company’s database to insure that no further contact is made with the person.

- 4.50 The Company will publish an appropriate privacy policy on the Company’s website and make copies of this policy available on request.
- 4.60 If changes are made to this policy, the Company will only apply changes to information collected after the date of the change, unless the donor whose information was obtained prior to the change had knowledge of the practice, is not at risk of theft or personal harm as a result and the opportunity to opt out. For example, if the Company elects to change its policy against information sharing of certain contact information with third parties for marketing purposes, the Company may apply the practice to prior donors because they have long had the opportunity under the preceding policy to “opt out.”