

**Oregon Center for Public Policy
Confidentiality & Privacy Policies and Procedures**

**Adopted by the OCPP Board of Directors
February 7, 2007**

The following Confidentiality and Privacy Policies and Procedures were developed by the Oregon Center for Public Policy 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 Oregon Center for Public Policy 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 email or mail or wishes to be removed from any of our communications they can do so by contacting us by phone at (503) 873-1201 or via e-mail at: info@ocpp.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 or dismissal and denial of future access to information, will be taken against those who violate these policies.

Professional Standards and Privacy Practices

All employees, volunteers, and board members of the Oregon Center for Public Policy will read and abide by the Center's Confidentiality Policies and Procedures. This document will be provided to new employees, board members or other volunteers who are engaged in fundraising activities. They also can be found in board members' meeting notebooks.

All staff, board, and volunteers that have access to restricted information will be required to sign the OCPP'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 Oregon Center for Public Policy. These records contain specific information pertaining to those individuals important to the development efforts of the Center.

Information kept in development records must be relevant to the goals of the OCPP’s development efforts. It is the responsibility of each staff member, board member, or volunteer to submit only appropriate and relevant information for inclusion in files. In the event OCPP ever collects credit card numbers, they 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 Center’s donor database (currently Fundraiser Professional) is maintained and authorized by the Executive Director. Security procedures will be in place to ensure that different users’ have access to only those screens that are necessary to carry out their OCPP business.

In general, restricted or sensitive donor information will not be provided via email. However, in those cases where it is necessary, Center staff will use all possible caution to protect confidentiality.

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-OCPP) Sources

External sources requesting information such as the media may be given access to public or published information at the discretion of the Executive Director. 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 Executive Director.

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.