

## **UNITED WAY OF MARATHON COUNTY PRIVACY POLICY**

### **PURPOSE:**

This privacy policy articulates the principles, actions, and beliefs of United Way of Marathon County (UWMC) with regard to the information collected, retained, and used related to some of our primary customers, including our donors, volunteers, prospects, affiliated agencies, and related United Way organizations. This policy is intended to guide the actions of the UWMC's employees, volunteers, contractors, and authorized representatives.

### **POLICY:**

We value our donors, volunteers, prospects, and affiliated agencies (hereafter referred to as our "customers") and take their privacy seriously. We will respect the privacy of the personal and organizational information that we are privileged to have and learn about our customers. Our commitment to respect the privacy of our customers extends to how we obtain, use, protect, and share information about them. This privacy policy is intended to be applied in conjunction with related UWMC policies, including, but not limited to, the Donor Bill of Rights.

### **PRINCIPLES, ACTIONS, AND BELIEFS:**

- We do not sell customer information.
- Without the customer's consent, we do not provide customer information to organizations or individuals outside the United Way family of organizations.
- We contractually require any person or organization providing services or products to UWMC to protect the confidentiality of customer information.
- We will hold strictly confidential all information concerning donors and prospects, including names, addresses, names of beneficiaries, nature and value of estates, amounts of provisions or gifts, etc., unless a donor or prospect grants permission to use selective information for purposes of referral, testimonial, example, recognition, or publicity.
- We have procedures in place to limit access to information to those employees and volunteers who need to know such information in order to fulfill our mission.
- We educate our employees and volunteers on the importance of protecting the privacy and security of confidential personal and organizational information.
- We will use our best efforts to comply with the expressed wishes of any customer who does not want their name used in any promotional material, wishes their name removed from solicitation lists, or wishes to have their gifts or services be anonymous.
- We will collect, use, and share information about customers among employees, volunteers, affiliated agencies, and United Way of America only on a need-to-know basis and for the sole purpose of carrying out UWMC's mission.
  - 1) Information collected and used includes personal information obtained from donors, volunteers, and prospects through pledge cards, letters, surveys, applications, and other forms, in writing, in person, by telephone, or electronically (e.g. name, address, employer, birth date, credit card number, family members, interests, etc.).
  - 2) Individual information may also be collected about donors, volunteers, and prospects' present and past giving history, volunteer activity, committee service, information from public documents and reports, and any other interactions an individual may have had with UWMC or its agencies.
  - 3) Organizational information is collected from UWMC-affiliated agencies and prospective agencies for the purposes of certification or recertification of agencies so that the funds and/or services of the UWMC can be provided to those agencies. This information includes all data related to the present, past, and future operational, financial, planning, governance, functioning, and structure of the agencies.