



## **Donor Relationship and Privacy Policy**

### **General**

The Care Assurance System for the Aging and Homebound of Madison County (CASA) is a 501(c)(3) public charity and remains grateful for all of its donors. CASA is respectful of their privacy and philanthropy.

CASA follows the Standards for Charity Accountability, as posted by the Better Business Bureau. The full text of the standards is available on the BBB website at [www.give.org](http://www.give.org).

### **Rights of Donors**

CASA donors will receive an acknowledgement letter for use of reporting and tracking charitable contributions for tax purposes. If applicable, CASA will disclose the fair market value of goods or services provided to donors in exchange for the donated amount. Payments for special drawings or prizes are not tax-deductible and will not be acknowledged as such by CASA of Madison County.

Donor privacy is a fundamental element of fundraising for CASA. CASA will give each donor the opportunity to remain anonymous if they so choose. Likewise, they will be given the opportunity to be removed from lists publicizing donors and/or amounts of donations.

All information concerning donors or prospective donors, including their names, addresses, phone numbers or other contact information, financial transaction information (credit card number, bank account routing data, etc.) and the amount of their gift shall be kept strictly confidential by CASA unless permission is obtained from the donor to release such information.

CASA collects donor names and contact information only on CASA contribution forms used at all fund-raisers. Donor names and contact information generally may be used in thank you letters, tax letters, newsletters, social media, notifications of upcoming events, notifications to other people if the donor asked for their gift to be designated and did not request to remain anonymous. No financial account information is stored or retained by CASA; CASA has an account with a third party company whose specialty is storage and safeguarding such information.

For all donors, CASA respects the following principles as developed by the Association of Fundraising Professionals:

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- To keep all donors informed of the CASA's mission and how donated resources are being used;
- If requested, to notify the donor of the identity of those serving on the Board of Directors and to expect the board to exercise prudent judgement;
- To be given access to CASA's latest financial statements;
- To use the donor's gift for the purposes for which it was given;
- To receive appropriate acknowledgement and recognition, unless anonymity has been requested;
- To know that information about the donations will be handled with respect and confidentiality within the limits of the law. CASA does not track banking or credit card information and that information is never shared and is inaccessible from CASA through the Internet;
- To trust that all relationships with CASA employees and the Board of Directors will be professional in nature;
- To be informed whether those making solicitations for donations are volunteers, employees, or hired solicitors;
- To have their names deleted from mailing lists that CASA otherwise intends to share; and
- To feel free to ask questions when donating and to receive a prompt, truthful, and forthright answer.