



Shuswap Community Foundation

Statement of Privacy Policy

Information Collected Directly From a Donor:

The Shuswap Community Foundation will collect and record personal information provided to the Foundation by a donor through correspondence, conversations, meetings, conferences, donations, or other forms of communication. Such information will only be used by directors of the Foundation to fulfill the purpose for which it was originally collected, or for a use consistent with that purpose unless the donor expressly consents otherwise.

Such information may be used for the purpose of assisting the Foundation in:

- ✓ Distinguishing donors from each other;
- ✓ Assisting the donor in making a gift to the Foundation or creating a fund with the Foundation;
- ✓ Appropriately receipting, acknowledging and stewarding the gifts of donors and the grants from donors' funds;
- ✓ Determining the donor's motivation in creating a fund, to assist the Foundation in making decisions about distributions from the fund;
- ✓ Determining the donor's family members, friends or advisors, for the purposes of assisting those who wish to make donations into the fund, or tracking those family members or others who may have been designated advisors to a fund;
- ✓ Determining the nature and extent of a donor's interest in the causes they wish to support; or
- ✓ Determining the donor's particular wishes with respect to the administration of the fund or a gift.

This is not intended to be an exhaustive list, and the Foundation may collect other information about a donor from time to time as is determined appropriate by the Foundation's Board of Directors.

The Foundation will not share, or make available a donor's personal information with third parties unless:

- ✓ The donor authorizes the Foundation to share the information¹
- ✓ Sharing the information is necessary to process a donation;
- ✓ Is required for the operation of the Foundation, e.g. software development. We require these contractors keep personal information secure and confidential.
- ✓ The Foundation is required to do so by law.²

¹ For example. A description or a photo of a project funded by the Foundation may appear in a Foundation Report, advertising, or on the Foundation Website. A donor might be associated with that project, and that association would become public knowledge.

² It is unlikely, but not impossible, for example, for the Canada Revenue Agency to ask for details concerning the source of a particular gift reported by the Foundation.

"Anonymous" Donors

The Foundation will do everything in its power to respect the wishes of donors who do not want any form of public recognition for their contributions. If the donation is tax receipted, however, the usual details will be maintained in the records of the Foundation. "Anonymity" in the sense used here, is not a legal privacy issue.

Retaining Information

As the Foundation's business is the stewardship of endowment funds kept in perpetuity, all information collected from a donor will be retained permanently in summary form in the Foundation's electronic database. Paper documents such as deeds of gift will be retained permanently.

The Foundation is obligated to protect donors' personal information by making reasonable security arrangements against such risks as unauthorized access, collection, use, disclosure or disposal. Security measures have been integrated into the day-to-day operating practices of the Foundation.

Accessing Information

Donors may review the personal information the Foundation has recorded for that donor, and only that donor. Donors may also provide written permission to the Foundation to permit another individual to review the personal information the Foundation has recorded for that donor, but only for that donor.

Information Collected From Grant Applicants

The Shuswap Community Foundation will not share detailed information provided in a grant application or inquiry to the Foundation from any organisation or person associated with organisations applying to the Foundation for Grants except as follows:

- ✓ The Foundation will publish names of successful applicants, and may describe the project for which the grant was given.
- ✓ The Foundation may publish the final project reports (evaluations) supplied by donees. Brief project descriptions and/or photos supplied by donees may be used in Shuswap Foundation Reports, advertising or Website. When a representative of the Foundation takes a picture, permission for its use will be formally obtained.
- ✓ Information about donees will be supplied to The Canada Revenue Agency as required. Summaries of grants are posted as part of the T3010A on the CRA Website and are public information.

Summary information gathered from applicants, successful and unsuccessful, is maintained permanently in the Foundation's electronic database.

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