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**DONOR PRIVACY**APPROVED BY: \_\_\_\_\_ NUMBER: RDP-002HRI  
Executive Director

CATEGORY: Development DATE: 10/31/17

<b>MONITORING:</b> <ul style="list-style-type: none"><li>- ED to report on compliance</li><li>- Board to review policies</li></ul>	<b>FREQUENCY:</b> <ul style="list-style-type: none"><li>- Annually</li><li>- Bi-annually (every other year)</li></ul>
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**INTRODUCTION**

Homewood Research Institute (HRI) is a not-for-profit charitable organization under the laws of Canada. HRI encourages acceptance of cash donations for the purposes that help the organization further and fulfill its mission. HRI's Board of Directors and staff solicit outright and deferred donations from individuals, foundations and corporations to secure the future growth of HRI. Positive relationships among these parties are essential to HRI's financial stability.

**WHAT INFORMATION HRI COLLECTS**

HRI collects and uses personal information from donors that includes: amount donated, address, telephone number, and email address. Tax laws require HRI to keep contact information and the contribution level of donors on file.

**HOW HRI USES THAT INFORMATION**

HRI will use contact information of donors for the following purposes only:

- Distribute receipts for donations
- Thank donors for their donations
- Inform donors about upcoming fundraising and other activities
- Internal analysis and record keeping
- Reporting to relevant government agencies (these reports are not for public inspection)

Donors have the option to have their names publicly associated with their donation unless they explicitly ask to remain anonymous.

## **FINANCIAL INFORMATION**

All access to donor financial information is strictly limited to staff or volunteers who need to process those data. No such data are given to any person, organization or group who does not need to access those data.

HRI only uses online payment processing services with world class security and strong reputations. HRI does not store, nor does it have access to, donor's credit card information, bank account numbers, or other account data sent to those processing services.

## **CONTACT US**

If donors/the public have any questions about HRI's Donor Privacy Policy or if they wish to be removed from our email or post contact lists, they are able to easily confirm this via readily available email and telephone information

## **SUMMARY**

To optimize funding from individuals and other entities, HRI must be capable of responding quickly, and in the affirmative where possible, to all gifts offered by prospective donors. It is understood that except where stated otherwise, these policies are intended as guidelines, and that flexibility must be maintained since some gift situations can be complex, and decisions only made after careful consideration of a number of interrelated factors. Therefore, these policies will in some instances require that the merits of a particular gift be considered by the HRI Board of Directors and a final decision be made only by that body.

Date of Board Approval: December 4, 2017

Date Revised: December 4, 2017

Date Last Reviewed: December 4, 2017