

FRIENDS OF SAN RAFAEL VALLEY

DONOR PRIVACY POLICY AND ACKNOWLEDGMENT

Effective Date August 13, 2026

1. Purpose

Friends of San Rafael Valley (FoSRV) respects the privacy of its donors and is committed to handling donor information responsibly, transparently, and in a manner consistent with the donor's preferences and FoSRV's legal and financial obligations.

2. Information We May Collect

- Contact information, such as name, mailing address, telephone number, and email address.
- Gift and pledge information, including dates, amounts, gift purpose or restriction, payment method, and acknowledgment history.
- Information about events attended, publications received, volunteer or membership interests, and requests for program information.
- Communication, recognition, anonymity, and mailing preferences.
- Comments, suggestions, and other information voluntarily provided by the donor.

3. How Donor Information Is Used

FoSRV may use donor information to:

- Process and acknowledge gifts, maintain accurate financial records, and provide appropriate charitable-gift documentation.
- Honor gift restrictions, pledges, recognition choices, and requests for anonymity.
- Communicate about FoSRV's mission, programs, events, plans, campaign progress, and opportunities for involvement.
- Understand donor interests, improve stewardship, and evaluate fundraising activities.
- Meet applicable accounting, tax, reporting, and legal requirements.

4. Sharing and Disclosure

FoSRV does not sell, rent, trade, or exchange donor names, contact information, or mailing lists with other organizations.

Access to donor information is limited to authorized board members, officers, volunteers, professional advisers, and service providers who need the information to perform approved FoSRV responsibilities. They are expected to protect the information and use it only for authorized FoSRV purposes.

FoSRV may disclose information when a donor authorizes the disclosure, when needed to process a gift or provide an approved professional service, or when required by law, audit, regulation, or valid legal process.

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5. Public Recognition and Anonymity

FoSRV may recognize donors in campaign materials, reports, event materials, or other publications when appropriate. Donors may request anonymity or specify how they wish to be recognized. FoSRV will make reasonable efforts to confirm and honor those preferences before public recognition.

6. Information Security and Retention

FoSRV uses reasonable administrative, physical, and electronic safeguards to protect donor information from unauthorized access, loss, misuse, or disclosure. Donor records are retained only as needed for stewardship, accounting, tax, legal, and organizational purposes and are securely destroyed when no longer required.

7. Donor Choices

A donor may ask FoSRV to:

- Correct or update contact information.
- Change communication or mailing preferences.
- Discontinue fundraising communications while continuing to receive required gift acknowledgments or receipts.
- Change recognition preferences or request anonymity for future publications, subject to materials already produced or distributed.

8. Questions or Requests

Questions, corrections, or privacy requests may be submitted through FOSRV.org or mailed to Friends of San Rafael Valley, PO Box 714, Patagonia, AZ 85624.

9. Board Review

The Board of Directors may review and update this policy as needed. Material changes should be approved by the Board and reflected in the policy's approval and effective dates.

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I acknowledge that I have received and reviewed the Friends of San Rafael Valley Donor Privacy Policy. FoSRV values the trust of every individual, family, business, foundation, and organization that supports its mission.

FoSRV will use donor information only to process and acknowledge gifts, maintain required financial records, provide charitable-gift documentation, communicate about its mission and programs, and carry out appropriate donor stewardship. Access is limited to authorized persons who need the information for approved FoSRV purposes, and reasonable safeguards are used to protect it.

FoSRV does not sell, rent, trade, or exchange donor names, contact information, or mailing lists with other organizations. Access to donor information is limited to authorized board members, officers, volunteers, professional advisers, and service providers who need the information to perform approved FoSRV responsibilities. They are expected to protect the information and use it only for authorized FoSRV purposes.

Donor or Organization Name

Date

Signature of Donor or Authorized Representative

Printed Name and Title (if signing for an organization)

Recognition Preference

☐ Please recognize my/our gift ☐ Please keep my/our gift anonymous

Preferred Recognition Name (if different from above)

Additional Privacy or Communication Requests

FoSRV will make reasonable efforts to honor the preferences stated above. Questions or changes may be submitted through FOSRV.org or mailed to Friends of San Rafael Valley, PO Box 714, Patagonia, AZ 85624.