Confidentiality an imperative of Fundraising.

Confidentiality is a core value an imperative in fundraising, one of the statements on A Donor Bill of Rights that was develop by the American Association of Fundraising Counsel (AAFRC) is “to be assured that information about their donations is handled with respect and with confidentiality to the extent provided by the law.”

In the church people would get very nervous today if you start the annual appeal by asking members for specific amounts based on previous giving history. This means, potentially there is more than one individual who will know your donors name, giving history and other basic information.

Isn’t giving supposed to be confidential? Is not the church supposed to keep information confidential? Consider how much effective it would be to have only one individual soliciting, receiving, handling donors recognition, mailing thank you letters and managing all gifts in your congregation.

If this is your current donors information management, your church is certainly not keeping giving confidential, but a secret. A secret is kept by the one person who receives it, and should not be told to anyone else no matter what… so we hope.

Something that is confidential is revealed to the people who need to know it when they need to know it, and no one else.

For example… When I tell my doctor something, it’s confidential, and the doctor can still get a consult. The doctor final goal is to provide his patients with ultimate satisfaction and develop trust. So is in fundraising, you consult your core team in order to prepare the church fundraising strategy for your next annual appeal.

You need to exercise great deal of care as to how information is shared in your church; but high level of secrecy could potentially hamper fundraising and prevent your team from knowing the fundraising capacity of your church.

Another potential challenge is that your church would not develop an adequate donors recognition program. And this can result in losing all major donors.

Normally, donors don't received much in exchange for what they give; a thank you letter generally is the response to donors. But is that all a donor should get? The answer is obviously no; a donor likes to feel accomplished, recognized and that his contribution is helping the greater good.

However, all of the above can be summarized into the one thing every donor, regardless of the amount donated or the cause likes to experience inwardly, satisfaction.

Confidential information about donors and non-donors, as well as confidential information of the church in oral form or on electronic, magnetic or print media are protected in order to foster a trusting relationship between the constituent and the institution.

This means that the information is not available for anyone except development professionals and their agents, to see.

As a general rule, donors names and gifts information could be shared with the fundraising board chair, development chair or other individual directly involved with the organization fundraising program management.

It is the duty of the individual who handles the information to caution individual that the information is confidential and that it should not be shared with others. Giving histories should not be secret. They should be confidential. And that means you need to ask: what is the most appropriate use of this information?

In conclusion, remember that keeping all your donors information controlled by one individual does not necessary promote confidence in donors.

 All the professional fundraisers and pastors I talked to agreed that it is important to:

Always get written permission from clients before publishing their stories.

Find creative ways to shield personal details and identities for clients who could be hurt or embarrassed if their identities or personal details were revealed.

Be transparent about what you are doing. Your donors will continue supporting your organization.