

DONOR PRIVACY AND CONFIDENTIALITY POLICY

Baptist Health System Foundation, Inc. (dba Baptist Health Foundation) upholds the Donor Bill of Rights and respects the privacy of its donors and prospective donors and understands that it is of paramount importance to maintain the trust and confidence of the entire Baptist Health community including, but not limited to, all donors (online and otherwise), prospective donors, sponsors, partners, employees, and volunteers. Baptist Health System Foundation, Inc. created this Donor Privacy and Confidentiality Policy (“Policy”) to provide transparency as to our practices, policies, and procedures for the collection, use, and protection of information that is provided to us by donors and prospective donors (“Donor-Related Information”).

[The Donor Bill of Rights](#)

The Donor Bill of Rights was created by the Association of Fundraising Professionals (AFP), the Association for Healthcare Philanthropy (AHP), the Council for Advancement and Support of Education (CASE), and the Giving Institute: Leading Consultants to Non-Profits. It has been endorsed by numerous organizations.

CONFIDENTIALITY OF DONOR RECORDS

Protecting the confidentiality of Donor-Related Information is an essential part of the work done by Baptist Health System Foundation, Inc. All Donor-Related Information that is obtained by Baptist Health System Foundation, Inc. is handled on a confidential basis except as otherwise disclosed in this Policy or except as disclosed when the Donor-Related Information is provided to Baptist Health System Foundation, Inc. All Baptist Health System Foundation, Inc. staff having access to Donor-Related Information sign a confidentiality pledge and are expected to always demonstrate professionalism, good judgment, and care to avoid unauthorized or inadvertent disclosures of Donor-Related Information.

HOW WE PROTECT DONOR INFORMATION

Except as described in this Policy, Baptist Health System Foundation, Inc. does not otherwise disclose Donor-Related Information to any third parties, and we never sell, rent, lease or exchange personal information with other organizations. The identity of all who connect with us through any means including, but not limited to, our website, postal mail, and email is kept confidential. The use of Donor-Related Information is limited to internal purposes at Baptist Health System Foundation, Inc. by authorized individuals,

and to advance resource development efforts such as stewardship activities and additional appeals that require Donor-Related Information.

We have established and implemented reasonable and appropriate physical, electronic, and managerial procedures to safeguard and help prevent unauthorized access, maintain data security, and ensure the proper use of Donor-Related Information. Baptist Health System Foundation, Inc. secures the personally identifiable information provided on computer servers in a controlled, secure environment, protected from unauthorized access, use, or disclosure. When payment information (such as a credit card number) is transmitted to other Web sites, it is protected using encryption, such as the Secure Socket Layer (SSL) protocol. Moreover, credit card numbers are not retained by Baptist Health System Foundation, Inc. once processed.

Although we have implemented reasonable and appropriate measures to safeguard against unauthorized disclosures of Donor-Related Information, our security measures may not prevent all losses, and we cannot ensure that information will never be disclosed in a manner that is inconsistent with this Policy. In the event of such security failures or disclosures in contravention of this Policy, Baptist Health System Foundation, Inc. will provide notice in a timely manner. Baptist Health System Foundation, Inc. is not responsible for any damages or liabilities resulting from such unauthorized disclosures.

PUBLICATION OF DONOR NAMES

Unless otherwise requested by the donor, the names of all individual donors may be printed in Baptist Health System Foundation, Inc. reports and other internal and external communications. Baptist Health System Foundation, Inc. will not publish the exact amounts of a donor's gift without the permission of the donor though it may include the donor's name in a listing by general dollar amount ranges (e.g., Donations under \$5,000).

MEMORIAL/TRIBUTE GIFTS

The names of donors of memorial or tribute gifts may be released to the honoree, next of kin, an appropriate member of the immediate family, or executor of the estate unless otherwise specified by the donor. Gift amounts are not released without the consent of the donor or as required by law.

ANONYMOUS GIFTS

When a donor requests that a gift or fund be treated as anonymous, the donor's wishes will be honored outside of our own internal records.

TYPES OF INFORMATION COLLECTED

Baptist Health System Foundation, Inc. collects and maintains the following types of donor information when it is voluntarily provided to us by the donor or his/her designee:

- Contact information, including name, organization/company affiliation, title, addresses, phone numbers, fax numbers, email addresses, date of birth, family members, and emergency contact;
- Donation information, including amounts donated, date(s) of donation(s), method, and other information provided;
- Payment information, including credit card or debit card number, expiration date, security code, billing address, and other information necessary to process a donation or event registration;
- Information on events and workshops attended, publications received, and special requests for program or volunteer information;
- Information concerning events and hours volunteered; and
- Donor requests, comments, and suggestions.

HOW WE USE THIS INFORMATION

Baptist Health System Foundation, Inc. complies with all federal and state laws in the use of Donor-Related Information. Baptist Health System Foundation, Inc. staff may share information with donors, fund beneficiaries, and grantees information pertaining to their own gifts, funds, and grants. We use information obtained from donors and prospective donors to maintain records of donations; to respond to donor inquiries; to comply with the law or with any legal process served on Baptist Health System Foundation, Inc.; for IRS purposes; to analyze overall giving patterns in order to make more accurate budget projections; to develop strategies and present gift proposals; to issue donation acknowledgments; to understand donors' interests in our mission and to update them on the organization's plans and activities; to inform planning about who receives future fundraising appeals; to organize and promote fundraising events; and to inform donors of relevant programs and services through newsletters, notices and direct mail pieces; and to analyze our website usage.

Our contractors and service providers sometimes have limited access to Donor-Related Information while providing products or services related to gift processing and



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acknowledgments. Such access is subject to confidentiality obligations covering this information. Moreover, access to Donor-Related Information by these contractors and service providers is limited to the information reasonably necessary for the contractor or service provider to perform its limited function for us.

For example, donations may be processed through a third-party service provider, and our donors' information will be shared with such service providers to the extent necessary to process the donation.

Baptist Health System Foundation, Inc. may also use Donor-Related Information to protect against potential fraud. We may verify with third parties the information collected while processing a gift, event registration, or other donation. If donors use a credit or debit card on a Baptist Health System Foundation, Inc. website, we may use card authorization and fraud screening services to verify that the card information and address match the information supplied to us and that the card being used has not been reported lost or stolen.

Finally, we may compile Donor-Related Information in general categories of giving such as Individual Giving, Corporate Giving, Board Giving and so forth, for internal and external reports to our board of directors, funders and others who track our overall agency performance, but we exclude any names or other identifying information of the donor unless it is already public information.

REMOVING YOUR NAME FROM OUR MAILING LIST

Donors and prospective donors may ask to be removed from our email, mailing, or phone lists at any time. If you determine that information in our database is inaccurate or it has changed, we encourage you to notify us to modify your personal information by emailing us at PhilanthropyServices@bmcjax.com or by calling 904-202-2919 during business hours.

STATE OF FLORIDA FUNDRAISING NOTICE

As a registered 501(c)(3) nonprofit organization, Baptist Health System Foundation, Inc. relies on private support, applying all fundraising monies to the purpose being supported. In connection with Baptist Health System Foundation, Inc.'s fundraising activities, Florida requires us to advise that a copy of our financial report is available from them. A copy of the official registration of Baptist Health System Foundation, Inc. and its financial information may be obtained from the Division of Consumer Services by calling Toll-free (800) 435-7352 within the State of Florida or online at



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www.FloridaConsumerHelp.com. Registration does not imply endorsement, approval, or recommendation by the state. Tax ID # 59-2487135.

Baptist Health System Foundation, Inc., reserves the right to determine who should have access to the donor database for privacy and pursuant to the Donor's Bill of Rights.