

UNC Health Foundation

DONOR PRIVACY AND CONFIDENTIALITY POLICY

Board approved May 2024

The UNC Health Foundation (the “Foundation”) is committed to protecting the privacy of our donors and the personal information donors may share with the Foundation or that the Foundation holds. The Foundation values its donors' trust and developed this Donor Privacy and Confidentiality Policy (the "**Policy**") to provide transparency of the information the Foundation collects about its donors and prospective donors and the Foundation's practices for using, maintaining, protecting, and disclosing that information. Please also see the Foundation's Website Privacy Policy (<https://unchealthfoundation.org/about/privacy-policy/>) for additional information for users of the Foundation's website.

HOW WE COLLECT INFORMATION

The Foundation collects and maintains personal information that our donors and prospective donors, provide to us when donors:

- (a) Contact us by phone, mail, or email, in person, or via our website.
- (b) Register for an event.
- (c) Make a contribution, either on our website, at a special event, over the phone, or by mailing in a check.
- (d) Become a patient of UNC Health, unless that person opted out of being contacted for fundraising purposes.

From time to time, we may collect personal information from donors in ways not described above, subject to a donor's express approval.

TYPES OF INFORMATION COLLECTED

The Foundation collects and maintains the following types of information about its donors:

- (a) Personal information, including:
 - (i) Contact information and UNC affiliation information, such as name, address, email, telephone number, date of birth, company affiliation and title, UNC alumni status, UNC clubs and memberships, and family relationships.
 - (ii) Giving information, including types and amounts of donations, and date(s) of donations.
 - (iii) 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. The Foundation utilizes secure

transaction methods when collecting credit card information over the internet. The Foundation does not disclose credit card account information provided by donors, except for the proper processing of donations.

- (iv) Information on events attended and publications received.
 - (v) Donor requests, comments, and suggestions.
 - (vi) Any other information provided by the donor to the Foundation, such as public comments or posts on the Foundation's website.
- (b) Non-personal information that does not personally identify someone, including information that is anonymized, aggregated, or publicly available when not combined with non-publicly available information about the person.

CONFIDENTIALITY

All information about any financial and non-financial transactions between donors and the Foundation is considered highly confidential and we employ appropriate security measures designed to protect it. While the information is kept confidential, it is shared with the Foundation's board members, staff, and professionals on a need-to-know basis and in compliance with all laws, regulations, court orders, or other governmental requests.

HOW THE FOUNDATION USES PERSONAL INFORMATION

The Foundation collects and maintains personal information to:

- (a) Establish a relationship and communicate with donors about the Foundation, including programs, special events, and funding needs.
- (b) Learn about our donors and their interests.
- (c) Process donations and event registrations and issue tax receipts.
- (d) Comply with all laws and regulations, including reporting requirements.
- (e) Plan future fundraising activities and events.
- (f) Analyze giving patterns.
- (g) Solicit feedback from donors by conducting surveys.

Publication of Donor Names: Unless otherwise requested by the donor, the names of all individual donors may be printed in the Foundation's reports and other internal and external communications. The Foundation will not publish the exact amounts of a donor's gift without the donor's permission.

Memorial/Tribute Gifts: The names of donors of memorial or tribute gifts may be released to the honoree, next of kin, appropriate member of the immediate family or executor of estate unless

otherwise specified by the donor. Gift amounts are not released without the consent of the donor.

Anonymous Gifts: When a donor requests that a gift or fund be treated as anonymous, the Foundation will honor the donor's request, and only limited Foundation staff will know the donor's identity.

The Foundation will not share, sell, or exchange a donor's personal information with any other entity for third-party fundraising or marketing purposes, except as provided in this Policy or as expressly consented to by the donor. To the extent that a third-party service provider is used to process any donations, the provider is bound by strict confidentiality rules, and a donor's information will only be used to the extent necessary to process the donation.

HOW THE FOUNDATION PROTECTS PERSONAL INFORMATION OF ITS DONORS

The Foundation has established and implemented reasonable and appropriate physical, technical, and administrative safeguards to protect a donor's personal information against unauthorized access, use, alteration, or destruction. However, the Foundation's security measures may not prevent all losses and we cannot ensure that someone's personal information will never be disclosed in a manner that is inconsistent with this Policy. In the event of a use or disclosure of personal information that violates state or federal law, the Foundation will follow all applicable state and federal notification requirements to make the donor aware of what happened. The Foundation is not responsible for any damages or liabilities.

HOW TO ACCESS AND CORRECT PERSONAL INFORMATION

Donors can review and request changes to the personal information that the Foundation has collected by contacting the Foundation as described in the "Contact Us" section below. However, please be aware that the Foundation may not accommodate a change request that would impact record retention or other operational requirements like remembering email opt-out preferences, violate any law or legal requirement, or cause the information to be incorrect.

COMMUNICATIONS

The Foundation will from time to time communicate with donors, including by telephone, text, email, and mail, concerning the Foundation's charitable activities, events, and requests for future support. The Foundation will not call or email donors or send mailings to donors on behalf of other organizations [without the donor's express consent]. To opt out of receiving these communications, donors may contact the Foundation as described in the "Contact Us" section below or by clicking on the "unsubscribe" link in any email communications.

RECORD RETENTION AND DESTRUCTION

The Foundation complies with all Internal Revenue Service, state, and local regulations and the Foundation's internal policies governing the retention, management, and destruction of donor information collected and maintained by the Foundation.

CHANGES TO THIS POLICY

This Policy is current as of the date stated at the top of this Policy. The Foundation reserves the right to amend this Policy from time to time. The Foundation will post any updates to this Policy on its website and note the date of last update. Donors are responsible for periodically visiting our website and this privacy policy to check for any changes.

DONOR BILL OF RIGHTS

The Foundation has adopted the Donor Bill of Rights from the Association of Fundraising Professionals. A copy of the Donor Bill of Rights may be found by visiting <https://afpglobal.org/donor-bill-rights>.

CONTACT US

To opt out of receiving communications from the Foundation, to review the personal information that the Foundation has collected about donors, or to ask any other questions regarding this Policy, please contact the Foundation at the below email or phone number, or submit a request via the Foundation's "Contact Us Form" on the Foundation's website.

By Email: unhealthfoundation@med.unc.edu

By Phone: (919) 966-1201 or toll-free 1-800-962-2543