



Association of Lutheran Development Executives  
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**Musings: ALDE's Code of Ethical Principles and Practices**  
*Compiled 10/2002*

## 5. Maintain confidentiality in handling donor and prospective donor records

### **First Priority: Protecting Donor Privacy**

*By Sandra Potts-Eklund, Regional Director of Resource Development  
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John Doe has just returned to the office after visiting a donor. The donor, a long-time friend of the organization for which John works, has shared a great deal of personal information. He talked about family and business troubles, including wise and not-so-wise business decisions. He also shared with John information about personal and business connections with the organization. Possible ways to invest in the organization's future were also discussed. When John returned to the office, he spends a great deal of time entering much of the conversation into the case file.

As development executives, each of us regularly enters into privileged relationships with donors and potential donors. People share a great deal of information with us, some of which is very personal and private. You may remember such instances: the lonely widow who shared her latest health concerns, the elderly bachelor who told you about his family's history, or a couple who shared intimate information about their financial status. Like John, we must make decisions about what information is recorded in a donor's file and what information is best left out.

All of us realize the importance of keeping records that document our work and information pertaining to specific donors. Documentation must include significant personal details that characterize the donor situation and explain the basis for decisions. At the same time, documentation must protect the donor's privacy and avoid redundancy. When entering data into a record an important question to ask is, "What significance does this information have to the desired outcome?"

Confidentiality implies confidence and trust. Confidentiality safeguards personal information that the donor reveals in the context of the professional relationship and limits the flow of information out of the organization. It is the primary means through which we protect the donor's privacy. We can enhance confidentiality when our organizations establish and enforce policies that prohibit inappropriate or unnecessary disclosure of information about donors. One simple way to do this is for the organization to limit who has access to the development records.

ALDE members profess that they will "maintain confidentiality in handling donor and prospective donor records." This principle guides us in deciding what is appropriate to record in donor records, and can also help us (and our organizations) establish policies about who has access to donor records and with whom information should be shared. Protecting donor privacy is indeed a high priority in our work.