Our Privacy Policy:
A Commitment to Our Donors
Together We Can Make a Difference
For a city to be truly great it must be great for everyone.
United Way
of Calgary and Area

Overview

Our Decision

Our Development Process

A Phased Approach

United Way Tools

Constant Review

Questions & Answers

Our Decision

- Public Trust requires transparency and accountability in maintaining privacy
- Commitment to protecting the privacy of donors, volunteers, employees and others
- Striving to be a Leader in the Sector and to embrace best practices in all we do
- Working with organizations and individuals who must comply
- Future belief that non-profit organizations will need to fully comply

Our Development Process
Objectives
• Appoint a Privacy Officer
• Create a Privacy Team
• Determine how Federal and Provincial Legislation relate to our work
• Conduct Privacy Audits beginning with key areas affecting donors
• Develop Policies to address any gaps
• Provide Training to all staff on Legislation and our policies
• Provide Training to volunteers on Legislation and our policies

A Phased Approach

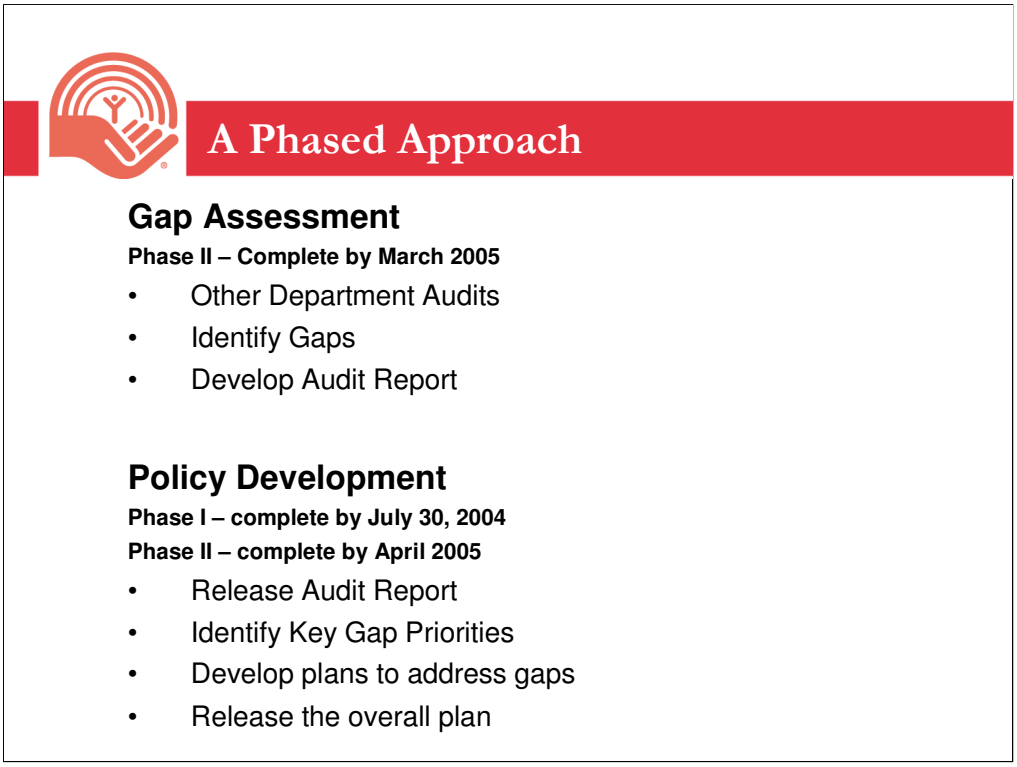
Research

- Legislation
- Other United Ways
- Other Non-Profit Organizations
- Corporate Policies
- Tools for Conducting Audits

Gap Assessment

Phase I – Complete by June 30, 2004

- Discuss Breadth of Audit
- Choose Tool
- Audit Key Departments
- Identify Gaps
- Develop Audit Report


A Phased Approach
Gap Assessment
Phase II – Complete by March 2005
• Other Department Audits
• Identify Gaps
• Develop Audit Report
Policy Development
Phase I – complete by July 30, 2004
Phase II – complete by April 2005
• Release Audit Report
• Identify Key Gap Priorities
• Develop plans to address gaps
• Release the overall plan

A Phased Approach

Training

Phase I – Complete by August 2004 for Campaign

Identify Key Groups for Training

- All staff
- Volunteers – Board/ Campaign Cabinet/Campaign Volunteers

Develop Training & Tools

- Training Sessions Information
- Manual Information
- Confidentiality Agreements
- Opt Out Forms etc

Implement Training

- Staff Meetings
- Board Meetings
- All Campaign Meetings
- All Volunteer Manuals

A Phased Approach

Roll Out

Phase I – complete by August 2004

Develop Communication Tools

- Internal
- External

Identify & Prioritize Target Audiences

- Internal
- External

United Way Tools

- Policy Development Summary
- **External :**
  - Our Privacy Policy – A Commitment to Our Donors
  - UnitedWay@Work Privacy Information & Notes & Opt-Out Messaging
- **Internal:**
  - Privacy – Frequently Asked Questions
  - Privacy Procedures for Staff
  - File Storage & Shredding Guidelines
  - Guidelines on Permitted Collection, Use & Storage of Personal Information
  - Employee Campaign Privacy Best Practices Checklist
  - Confidentiality Agreements

Constant Review
• Monitor developments in Legislation
• Adjust/Add to our Policies as necessary
• Annually review our policies – especially for training and organizational changes
• Deal with issues as they arise
• Contact with/Visits to the Privacy Commissioner to review policies or develop policies when concerns arise (include organizations where possible)

Contact Information

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(Donor Privacy – bottom right corner)