



## WILLIAM & MARY FOUNDATION

### DONOR PRIVACY & PROTECTION POLICY

The William & Mary Foundation (“the Foundation”) is committed to honoring the trust placed in it by its donors, alumni, and broader community. Stewardship of that trust extends beyond financial accountability to include the responsible and respectful handling of personal information. The Foundation recognizes that donor privacy is fundamental to maintaining confidence in its mission and operations and, accordingly, maintains policies and practices designed to safeguard the confidentiality, integrity, and appropriate use of donor information.

#### **Information Collection**

In the course of its work, the Foundation collects and maintains information necessary to support its advancement mission. This may include contact details, records of philanthropic support, communication preferences, and other information relevant to fostering meaningful and informed engagement with donors. In certain cases, the Foundation may also incorporate publicly available information to better understand donor interests and align philanthropic opportunities with institutional priorities. Consistent with widely recognized data governance principles, the Foundation seeks to limit its collection of personal information to that which is necessary and appropriate for these purposes.

#### **Use of Donor Information**

Information entrusted to the Foundation is used to process and acknowledge gifts, administer pledges, support donor recognition and stewardship activities, and communicate information about the University and its programs. It is also used to fulfill legal, financial, and audit obligations. The Foundation processes donor information based on a combination of donor consent, legitimate institutional interests, and applicable legal obligations. The Foundation does not use donor information for purposes unrelated to its mission, nor does it sell, rent, or otherwise commercially exploit donor data.

#### **Donor Rights and Choices**

The Foundation is committed to respecting donor preferences regarding privacy and communication. Donors may request anonymity in connection with their gifts, and such requests will be honored to the extent permitted by law and consistent with institutional policies.

Donors may also:

- Request to review or update their personal information
- Request, where appropriate, that certain personal information be removed or restricted, subject to legal, audit, and operational requirements
- Adjust communication preferences or opt out of certain communications

The Foundation endeavors to respond to such requests in a timely and reasonable manner, typically within 30 days, consistent with applicable legal and operational requirements.

From time to time, the Foundation may engage donors and constituents to review and update their personal information and communication preferences. These efforts are intended to ensure the accuracy of Foundation records and to respect individual preferences regarding engagement and communication.

## **Data Sharing and Third-Party Service Providers**

In carrying out its work, the Foundation may engage trusted service providers and technology partners to support its operations, including systems used for constituent relationship management, communications, and payment processing. In such cases, donor information is shared only as necessary to perform authorized functions on behalf of the Foundation. These partners are contractually obligated to maintain the confidentiality of the information entrusted to them, to use such information only for authorized purposes, and to implement appropriate safeguards to protect it. The Foundation does not sell or rent donor information to third parties.

## **Data Security and Protection**

The Foundation employs a range of administrative, technical, and physical measures designed to protect donor information from unauthorized access, use, or disclosure. These measures include controlled access to systems and data, secure processing of financial transactions, and ongoing monitoring of systems and practices. The Foundation also evaluates the security practices of its vendors and service providers as part of its broader risk management approach.

Donor information is retained in accordance with the Foundation's records management practices and applicable legal and regulatory requirements. Information is maintained only as long as necessary to fulfill the Foundation's operational, stewardship, legal, and audit responsibilities, and is not retained longer than necessary for those purposes.

Although the Foundation does not disclose donor information except as described in this policy, there may be limited circumstances in which disclosure is required by law, such as in response to a valid subpoena, court order, or other legal obligation. In such instances, the Foundation will take appropriate steps to ensure that disclosures are limited to what is required and handled in a manner consistent with its commitment to donor confidentiality.

## **Data Breach Response**

In the event of a data security incident involving donor information, the Foundation will act promptly to investigate the matter, mitigate any potential harm, and comply with applicable notification requirements. Protecting the integrity of donor information remains a critical priority in all circumstances.

## **Governance and Oversight**

Oversight of donor privacy practices is an ongoing responsibility of the Foundation. The Foundation periodically reviews and updates its policies and procedures to reflect evolving legal standards, technological developments, and best practices within the nonprofit and higher education sectors. Staff and relevant stakeholders are expected to uphold these standards as part of the Foundation's broader commitment to ethical conduct and institutional stewardship.

This policy reflects the Foundation's alignment with evolving privacy expectations and regulatory frameworks, including principles embodied in the Virginia Consumer Data Protection Act, the California Consumer Privacy Act, and the General Data Protection Regulation. While all such laws may not directly apply to the Foundation, they inform a standard of care that emphasizes transparency, accountability, and respect for individual privacy. Where applicable, the Foundation will comply with international data protection requirements governing the processing of personal data. The Foundation also recognizes the importance of donor confidentiality as affirmed in decisions such as *Americans for Prosperity Foundation v. Bonta*, which underscores the broader principles supporting the protection of donor identity.