

# HERITAGE CHRISTIAN SCHOOL

## CONFIDENTIALITY and INFORMATION MANAGEMENT POLICY and PROCEDURES

### *Confidentiality and Information Management Policy*

**All hard-copy files relating to enrollment, students and the solicitation of gifts in the possession of Heritage Christian School (HCS) are the confidential property of that office.**

- Documents will be carefully managed, maintained and supervised to ensure privacy and confidentiality.
- The Education Edge, Financial Edge, Raiser's Edge and Auction databases and the information in them are the property of the HCS, a private 501(c) organization. Access to and management of that information is in accordance with HCS policies, procedures and permissions.

### *Confidentiality and Information Management Procedures*

- Access to HCS information and documents is restricted to authorized HCS personnel based on a need-to-know basis according to job function. All personnel must sign a confidentiality agreement in order to access any HCS information or databases. **Access by other persons or agencies is determined by the Headmaster** or his/her designee.
- **Files may not be removed from HCS offices and must be maintained in cabinets or rooms that are locked when authorized personnel are not in attendance.**
- Information in HCS files will not be released to HCS volunteers except in the course of regular HCS business and only upon having the volunteer sign a statement of confidentiality and with the approval of the Headmaster or his/her designee.
- Financial and gift information will not be released to non-development employees or persons or agencies external to HCS except as necessary to regular HCS business. Any volunteers authorized to do business on behalf of HCS may be granted such access as long as their signed confidentiality agreement is on record.
- Names and addresses will not be released to agencies or persons external to HCS administration and faculty except in the course of regular HCS business. Under no circumstances will names or addresses be released for mailings not relevant to HCS business. Vendors and auditors must guarantee confidentiality of information submitted to them under contract for HCS work.
- Individuals and organizational representatives may request to see their own individual or organizational files **by making an appointment with the appropriate administrative staff person or Headmaster and only with permission of the Headmaster** or his/her designee. Persons granted such access will be supervised and will not be allowed to access any other files, copy information or remove items from file.
- New information added to the files must be verifiable and from a reliable source.
- All authorized personnel are responsible for maintaining the confidentiality, orderliness, accuracy and timeliness of file information.

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## CONFIDENTIALITY AGREEMENT

Heritage Christian School (HCS) engages in educational and fund raising activities in support of its mission, programs and priorities. File information maintained for administrative and development purposes is considered proprietary and confidential to the HCS. Access to HCS information and documents is restricted to authorized persons engaged in administrative, teaching and development work on behalf of the University. Authorization is given to those who have signed this confidentiality agreement on a need-to-know basis according to job function. Need-to-know determinations are ultimately made by the Headmaster or his/her designee.

Persons with access to HCS file and database information will endeavor to protect confidentiality to the best of their ability. No information will be disclosed, except as permitted by HCS confidentiality and information management policies and procedures. No personal use will be made of confidential information. Authorization for access to confidential information in the files by external agencies or persons can only be granted with the permission of the Headmaster or his/her designee.

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In signing this document, I acknowledge that I have read and agree to abide by the terms of the Heritage Christian School statement of confidentiality and confidentiality and information management policies and procedures. Further, I have read and agree to abide by the tenets put forth in the Association of Prospect Researchers for Advancement (APRA) and Council for the Advancement and Support of Education (CASE) Statements of Ethics and the CASE Donor Bill of Rights.

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Print Name

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Title/Office

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Signature

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Date