



Personal and Financial Information

The Family of Faith campaign office is part of the ShareLife and Development Office of the Archdiocese of Toronto. The campaign is using proven and broadly accepted fund-raising methods widely practiced in philanthropic giving. To be successful, the Family of Faith campaign will require:

- Accurate data from parishes regarding a prospective donor's financial capacity to make a gift within the donor's means. Note: while data is housed at the parish level, the Archdiocese of Toronto is the legal entity that owns the data;
- The insights and knowledge of pastors to identify prospective donors and qualified volunteers to assist with the parish campaign; and,
- Actively engaged volunteers who will be ambassadors for the pastor and the campaign as they meet with prospective donors.

The Archdiocese of Toronto and the ShareLife and Development Office are committed to respecting the confidentiality of personal and financial information. Accordingly, there are important safeguards and practices in place to ensure confidentiality and compliance with the archdiocesan Privacy Policy, including:

- **Security of parish databases:** Databases are provided to the campaign office on USB devices that are personally collected by campaign office staff. No databases are sent electronically via the internet to the campaign office;
- **Campaign staff:** All campaign office staff have been vetted and have signed confidentiality agreements;
- **Volunteers:** Volunteers who assist with parish campaigns must be approved by pastors and complete the Family of Faith's Volunteer Information document (attached);
- **Limited information sharing:** When volunteers meet with prospective donors, they know the range of gift to seek only. Specific information regarding a prospective donor's past giving is not shared with volunteers.

Policies and Guidelines

The campaign is governed by Policies and Guidelines developed in consultation with the Family of Faith campaign's Priests' Advisory Committee and approved by Cardinal Collins. The Policies and Guidelines state:

1. Throughout the campaign, parishes will be required to submit specific parishioner data in written and electronic form to the Development Office / Campaign Office.
2. This information will be kept confidential and will not be shared with individuals outside of the respective parish, Development Office or Campaign Office. Information attained will be shared back with the parishes upon completion of the active solicitation in July 2015.

3. As part of the archdiocesan plan, the Campaign Office will use Parish Tools or other data management system to obtain a parishioner's:
 - a. Full name, address, telephone number, e-mail address;
 - b. Previous offertory giving, including ShareLife and second or special collections, from the past three years; and
 - c. Other pertinent information such as local parish campaign data, programmatic support and ministry involvement.
4. The Campaign Office staff will use this information to assist parishes in planning and executing their local fundraising efforts.
5. Parishioner data obtained from parishes will benefit local parish fundraising and the campaign. With accurate data, the Campaign Office can conduct individual wealth capacity research to identify previously unknown public information on a parishioner's philanthropic giving to other institutions. This will allow the Campaign Office to determine appropriate gift request levels; ultimately maximizing a parishioner's giving capacity.

The Important Role of Volunteers

Potential parish campaign volunteers are identified by pastors. The Family of Faith Parish Campaign Director assists in this process by helping to match the skillsets of potential volunteers against the descriptions of roles that comprise the campaign's Campaign Executive Committee.

Before assuming their role, volunteers must complete the Family of Faith's Volunteer Information form. This form (attached) was developed by the Archdiocese of Toronto's Volunteer Screening Program & Human Resources staff.

The campaign relies on the knowledge and judgment of pastors to help match volunteers to prospective donors in the solicitation process.

Summary

- The Family of Faith campaign office is part of the ShareLife and Development Office of the Archdiocese and uses proven and broadly accepted fund-raising methods widely practiced in philanthropic giving;
- While data is housed at the parish level, the Archdiocese of Toronto is the legal entity that owns the data;
- Safeguards and practices are in place to ensure confidentiality and compliance with the archdiocesan Privacy Policy;
- Personal financial data is confidential. No volunteers are provided specific, identifying information about a prospective donor's past charitable donations nor financial circumstances;
- The campaign is governed by Policies and Guidelines developed in consultation with the Priests' Advisory Committee and approved by Cardinal Collins; and,
- Prospective parish campaign volunteers must be approved by the pastor and complete a Volunteer Information form before they can meet with prospective donors.

Contact

Chris Polito
Executive Director
Family of Faith Campaign
cpolito@archtoronto.org
416.934.3400 x806

Marc Lerman
Privacy Officer
Archdiocese of Toronto
privacyofficer@archtoronto.org
416.934.3400 x505

John E. Ecker
Director, Campaign Communications
Family of Faith Campaign
jecker@archtoronto.org
416.934.3400 x805