



The Oregon Historical Society (OHS) holds **integrity** as our core institutional value. OHS aspires to consistently enact the following values, as named in our 2019 to 2023 Strategic Plan: integrity, invitation, equity & inclusion, cultural humility, accessibility, and learning. Integrity means OHS is committed to honest communication, transparency, and managing resources in a trustworthy and accountable manner. We foster evidence-based practices in our research, scholarship, exhibits, educational programs, and publications.

OHS has implemented this Donor Privacy and Recognition Policy to guide our volunteers and staff on how OHS may and may not use a donor's personal information. This policy may be updated from time to time to comply with recommended guidelines set forth by the American Association of Museums and will be listed on OHS' website for transparency.

What Information We Collect

OHS collects and uses personal information from donors including: name, amount or description of items donated, address, email addresses, telephone number, and donor comments, donors' wishes around recognition and communication. Tax laws in the United States and the State of Oregon require OHS to keep contact information and contribution level of donors on file.

How We Use Information

OHS never sells, rents, or trades donor names or information. Unless a donor requests anonymity, donor names are released for publication and recognition purposes only:

- Recognize donors (giving collection items or \$250 or more) in the Annual Report (available on OHS website, mailed on request);
- Recognize donors (to specific exhibitions and projects) on signage within the Oregon Historical Society (when recognition is an expected benefit of the donation);
- Recognize donations in honor or memory in the *Historian* newsletter (available on OHS website and mailed to donors and members).
- Include provenance information with donor name in library and museum catalog records.

OHS will use contact information (email, telephone number, and address) of donors for these purposes only:

- Distribute receipts for donations;
- Thank donors for their donation;
- Follow up with questions regarding the donation;



- Inform donors about exhibitions, programs, events, membership expiration and funding needs, and to share Oregon history (including sending the *Oregon Historical Quarterly*; weekly e-digests, Historian newsletter, and Annual Report—unless the donor request no *Quarterly*, no mail, and/or no email);
- Internal analysis and record keeping;
- Reporting to relevant U.S. and State agencies;
- Annual auditing;
- Grant reporting;
- Contact donors about changes to this policy.

The Importance of Names

Donors have the option to have their name publicly associated with their donation or may explicitly request to be anonymous.

As a historical institution, we understand the importance of donors' being recognized as they wish to be named, and we understand that naming conventions and choices change over time. Kindly correct us if we are not addressing or recognizing you as you prefer!

Financial Information Confidentiality

All access to donor financial information is strictly limited to professional staff to process the data. No such data is given to any person, organization, or group who does not need to access the data. OHS strives to provide the highest possible level of security and confidentiality as possible. If a data breach occurs, OHS will inform donors promptly. All controls in place are reviewed on an annual basis during the organization's financial auditing process by a professional auditing firm.

Contact Us

Please contact us (503-306-5220 or membership@ohs.org), if you have questions about this policy, if you wish to be removed from our email or postal contact lists, or if you wish to be recognized differently. We are grateful for you and your generosity. At OHS, we value learning and are open to questions, new ideas, and concerns.