

Heritage & Opportunity Alliance, Inc.
HERITAGE & OPPORTUNITY ALLIANCE, INC.

DATA PRIVACY AND CONFIDENTIALITY POLICY

Preserving Heritage. Building Opportunity. Organizing Community Engagement.

Policy Number	HOA-POL-004
Effective Date	Upon Board Adoption
Approved By	Board of Directors
Applies To	Directors, officers, committees, advisory members, volunteers, employees, contractors, partners, and program participants as applicable

Purpose

This Policy protects personal, resident, youth, volunteer, donor, partner, and program information collected or used by Heritage & Opportunity Alliance, Inc..

Scope

This Policy applies to all information collected through sign-in sheets, surveys, resource clinics, oral histories, photo releases, youth programs, volunteer records, grant reports, fundraising, partner referrals, communications, and events.

Confidential Information

Confidential information includes names with sensitive needs, addresses, phone numbers, emails, youth information, emergency contacts, health-related information, housing/property concerns, financial hardship, legal or re-entry information, recovery information, family stories, photos, and any information a reasonable person would expect to be protected.

Collection Limits

The corporation shall collect only information reasonably needed for its charitable, educational, cultural, youth, health, referral, program, grant, or community-development purposes.

Forms should explain why information is collected, how it may be used, and whether participation is voluntary.

Use and Sharing

Confidential information may be used only for authorized organizational purposes.

Public reports should use aggregate data unless written permission is obtained.

Resident stories, photos, youth images, oral histories, and property information may not be published or shared publicly without documented permission and appropriate release.

Youth Data

Youth information requires heightened protection. Parent or guardian permission should be obtained when required or appropriate. Youth sign-in, emergency contacts, waivers, medical notes, and incident records shall be restricted to authorized adults with a need to know.

Access Controls

Access to confidential information shall be limited to persons authorized by the Board, officers, program leads, or policy. Volunteers may not handle sensitive information unless trained and approved.

Electronic Privacy

Electronic files containing confidential information should be password protected or stored in approved systems. Email and text transmission of sensitive information should be limited and handled carefully.

Incident Response

Any suspected unauthorized disclosure, lost records, breach, misuse of information, or improper public release shall be reported promptly to an officer or Board representative. The Board shall determine corrective action, notice, and documentation.

Records

The Secretary, Treasurer, or other Board-authorized records officer shall maintain records created under this Policy according to the Records Retention and Document Control Policy.

Records may include approvals, disclosures, invoices, receipts, reports, correspondence, minutes, incident reports, releases, agreements, restricted-fund logs, or other supporting documents.

Violations

Violations of this Policy may result in corrective action, reassignment, removal from a committee or volunteer role, termination of a contract, repayment, report to the Board, or other action permitted by law and organizational policy.

Retaliation against a person who raises a good-faith concern is prohibited.

Review and Amendment

This Policy may be reviewed at least annually and may be amended by the Board of Directors. The Board may adopt more detailed procedures, forms, checklists, and approval schedules consistent with this Policy.

Board Adoption

This Policy is adopted by the Board of Directors and remains in effect until amended, replaced, or rescinded by the Board.

Board Chair / President	Secretary
Name: _____	Name: _____
Signature: _____	Signature: _____
Date: _____	Date: _____