



Confidentiality Policy

The nature of the Community Foundation's role as a funder, leader, convenor, and decision-maker in the community results in the acquisition of extensive information that is considered privileged. A great deal of information is shared with the Foundation because of its reputation for trust and its ability to make fair decisions.

To safeguard the Foundation's integrity as a responsible decision-maker and to protect its capacity to gather data necessary to make those decisions, the Foundation subscribes to specific policies on confidentiality and privacy presented below. This policy is not intended to prevent disclosure where disclosure is required by law.

Policy:

- Community Foundation board members, employees, volunteers, committee members and subcommittee members (including community members appointed to serve as advisors or ad hoc members) must not engage in private discussions of Foundation matters (except when engaged in the business of the Foundation).
- The positions or statements of individual board members, employees, volunteers, committee members and subcommittee members (including community members appointed to serve as advisors or ad hoc members) must not be discussed outside of official Foundation meetings and processes.
- Content of Foundation business, including documents or Foundation analysis of documents, must not be discussed or shared outside of official Foundation meetings and processes. This includes information regarding donors, donations, pending grants, contracts and agreements entered into by the Foundation, policies and processes of the Foundation, financial information and business records of the Foundation, and other relevant data. Information regarding the Foundation's investment performance will be routinely published.
- All of the materials provided to board members, employees, volunteers, committee members and subcommittee members (including community members appointed to serve as advisors or ad hoc members) about an organization or individual as part of the scholarship or grant-making process and all discussion that takes place as part of the scholarship or grant-making process, whether an internal individual conversation or a discussion at a committee meeting, is confidential.

- All individual board members, employees, volunteers, committee members and subcommittee members (including community members appointed to serve as advisors or ad hoc members) must sign an agreement acknowledging their understanding of the confidentiality policy, including their agreement to refrain from disclosure of confidential information even after termination of employment or separation from the Board/ Foundation.
- Penalties for violating these confidentiality policies can include sanction or termination of employees and removal of board members.
- At the end of a board member's term in office or upon the termination of an employee's employment, he or she shall return, at the request of the Foundation, all documents, papers, and other materials, regardless of medium, that may contain or be derived from confidential information in his or her possession.

The undersigned hereby acknowledges and agrees to the above.

Name

Date

Title

Approved: January 22, 2002
 Revised: December 2011 (name change only)
 Revised: December 2013
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