



## CONFIDENTIALITY POLICY

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The nature of Central Kansas Community Foundation's role as a funder, leader, and decision-maker in the community results in the acquisition of extensive information that is considered privileged. Much 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, to protect its capacity to gather data necessary to make those decisions, and to enable the Foundation to responsibly carry out its important duties in the community, the Foundation subscribes to the policy on confidentiality set forth below.

### Policy

The Central Kansas Community Foundation Board members, including affiliate board members; committee members; and staff shall not engage in private discussions of or otherwise disclose to third-parties information regarding Foundation matters (except when engaged in the conduct of the proper business of the Foundation). All information that is not a matter of public record, or not otherwise authorized by the appropriate authority (i.e. the Board, a Committee of the Board, the Board Chair, the Executive Director) to be disclosed as public, shall be considered confidential.

### General Considerations of Confidentiality:

1. Personal statement of individual board, committee members, or staff shall not be discussed outside of official Foundation meetings and processes. Likewise, the decisions of the Board, Committees, or staff of the Foundation shall not be disclosed without appropriate authorization.
2. Content of Foundation business, including documents, reports, records, data, minutes or analysis of such materials performed by the Foundation, should not be discussed or shared outside of official meetings and processes. This includes information regarding donors, donations, pending grants, investments, contracts and agreements entered into by the Foundation, policies and processes of the Foundation, financial information and business records of the Foundation and the like.

**Confidentiality of Donor Information:** Except as required by law, the Foundation will not disclose information about a donor or a donor's gift. However, unless otherwise requested by the donor, the Foundation may publish the names of individual donors and name of fund(s) in the Foundation's Annual Report and other reported listings. In the case of memorial gifts, the Foundation will provide the names of donors to members of the immediate family unless the donor has requested anonymity. The Foundation will not disclose the amount of any gift without the donor's consent. The Foundation may accept anonymous gifts to it on a case by case basis.

**Confidentiality with respect to Grant Applicants and Grantees:** The Foundation may disclose the identity of organizational grant applicants. However, financial and personal information that applicants submit to it will be protected with confidentiality. This includes information provided by applicants for grants to individuals such as scholarships and hardship assistance. Except in the case of hardship assistance grants to individuals, the Foundation will generally disclose the identity of grantees and the amount awarded.

**Exceptions:** This policy does not apply to disclosures to attorneys, accountants and other professionals providing assistance to the foundation. It also does not apply to disclosures to tax authorities, government agencies, courts, or as otherwise required by law.

The following are considered public documents and information contained in them is not subject to the confidentiality requirements of this policy:

- The Foundation's annual report or financial review once it has been accepted by the board.
- The Foundation's investment and spending policies.
- The Foundation's Form 990 as required to be publicly disclosed. This does not include the names and addresses of donors as that information is not required to be disclosed.

If you have any questions about what is or is not appropriate to discuss outside of the Foundation or wish to seek permission to make a public disclosure of information that is otherwise confidential, please talk to the Board Chair or Executive Director.

I have read, understand and agree to comply with Central Kansas Community Foundation's Confidentiality Policy as outlined above.

Name (printed) \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please check at least one category below.

Central Kansas Community Foundation Trustee or Staff \_\_\_\_\_ (check here if applicable)

Affiliate Advisory Board \_\_\_\_\_ (check here if applicable)

Affiliate Foundation Name \_\_\_\_\_

Committee(s) Participate \_\_\_\_\_ (check here if applicable)

Name of Committee(s) \_\_\_\_\_

**Disclosure of Affiliations**  
**CKCF Board of Trustees, Affiliate Board of Trustees, Committee Members, and Staff Members**