

# JOHNSON COUNTY COMMUNITY FOUNDATION

## Confidentiality Policy

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*This Confidentiality Policy was approved by the Johnson County Community Foundation's Board of Directors on January 20, 2016.*

The JCCF maintains and manages confidential information about donors, prospective donors, grantees, prospective grantees, and wealth advisors and their firms. Effective functioning of the Foundation requires respecting the confidentiality of discussions that take place and information that is shared in the course of conducting Foundation business.

While this policy addresses some common confidentiality concerns, it is not an exhaustive list of all situations where a confidentiality obligation may arise. Questions about whether information is confidential or about situations in which confidential information may be released or discussed should be directed to the CEO or the Board Chair.

All employees and volunteers are responsible for maintaining confidentiality.

### **Donors**

Unless legally required, the Foundation will not disclose personal or financial 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 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 accepts anonymous gifts on a case-by-case basis.

### **Grant Applicants And Grantees**

The Foundation will not disclose the identity of grant applicants except as necessary to process the application and will protect the confidentiality of financial and personal information that applicants submit. Except in the case of hardship assistance grants to individuals, the Foundation will typically disclose the identity of grantees and the amount awarded.

Except as authorized by the Board, discussions and records of the Foundation's operations are generally not to be disclosed. This includes information about the Foundation's financial operations, fundraising, investments, personnel, grantmaking, and contractual relationships.

This policy does not apply to disclosures to attorneys, accountants and other professionals providing assistance to the Foundation or to tax authorities, government agencies, courts, or as otherwise legally required.

The following are not considered confidential:

- The Foundation's annual report or financial review once it has been accepted by the Board.
- 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.
- The Foundation's investment and spending policies.

I certify that I have read, understand, and agree to comply with the provisions of the JCCF's Confidentiality Policy.

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Name (printed or typed)

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Signature

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Date