



**COMMUNITY
FOUNDATION**
of Western Nevada

FOUNDATION OF WESTERN NEVADA CONFIDENTIALITY POLICY

I. Purpose

The Community Foundation of Western Nevada recognizes that the efficient operation of the Foundation requires the maintenance and management of extensive donor and prospect records. These records may contain sensitive information that has been shared with or developed by the Foundation staff on a confidential basis.

Additionally, donors are attracted to the Community Foundation on the basis of its ability to assure temporary or permanent anonymity. The purpose of this policy is to state the position of the Foundation on anonymity and donor/prospect records. "Records" mean all files, including electronic data, containing information on donors or prospective donors to the Foundation.

II. Confidentiality of Records

- a. All donor, prospect, and applicant records are confidential and all physical files and records are to be kept in a central filing location in locking cabinets.
- b. *When an anonymous gift is recorded, it shall be done in a manner where the electronic record is coded or tagged to ensure the donor's anonymity in protected reports.*
- c. To carry out its responsibilities, the Board of Trustees may need to review donor/prospect records. All board members and staff shall respect the Foundation's duty to protect the sensitive nature of those records.
- d. The Foundation's auditors are authorized to review donor and prospect records as required for the purposes for which they are engaged.
- e. The social security numbers of applicants shall not be included on application forms disseminated to scholarship selection committee members, but may be required from scholarship recipients for purposes of identifying students in correspondence with colleges and for internal records. Scholarship records are maintained electronically in a secure location, separate and apart from the Fund Folders and general records.

No information regarding any donor shall be sold or shared with any outside individual or organization unless required by law or unless the donor provides consent.

III. Publication of Donor Names

Unless otherwise requested by the donor, the names of individual donors will be listed in the Foundation's annual report and/or in other appropriate materials or instruments. The Foundation will

not publish the amount of any donor's gift without the permission of the donor. Donors making gifts to the Foundation by bequest or other testamentary device are deemed to have granted such permission. Donors should be aware that it is the Foundations practice to, from time to time, publish the current market value of its funds, from which a reader may be able to determine the approximate size of a donor's gift.

IV. Publicity

No public media exposure with respect to a donor's gift will be given to any media without the donor's consent.

V. Notification of Fund Advisors and/or Founders

Copies of gift acknowledgement letters stating donor's name and gift amount will be sent to the fund advisor and/or founder, unless otherwise specified by the donor.

VI. Anonymous Gifts

The President is authorized to accept anonymous gifts to the Foundation. The President shall disclose to the Executive Committee, upon a request, the names of any anonymous donors.

I have read and understand the Confidentiality Policy, and agree to honor this policy at all times, during and following employment with the Community Foundation of Western Nevada.

Staff/Board Member Signature

Staff/Board Member (printed)

Date _____