



## **CONFIDENTIALITY OF DONOR RECORDS POLICY**

### **Statement of Purpose**

The Community Foundation San Luis Obispo County (“Foundation”) recognizes that the efficient operation of the Foundation requires the maintenance and management of extensive donor and prospect records. These records often contain sensitive information that has been shared with or developed by the Foundation staff on a confidential basis.

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

### **Statement of Policy**

#### **Confidentiality of Records:**

The Board President (“President”) and Chief Executive Office (“CEO”) shall be responsible for maintaining the confidentiality of donor and prospect records. They may, at their discretion, make all or part of any record available to staff members or Foundation volunteers to assist them in executing their responsibility.

The Foundation's auditors are authorized to review donor and prospect records as required for the purposes for which they are engaged.

The Foundation does not share or make available lists of donors to outside organizations for any purpose without the express written approval of the CEO and the Executive Advisory Committee of the Board of Directors.

#### **Publication of Donor Names:**

Unless otherwise requested by the donor in writing, the names of all individual donors will be listed on the semi-annual fund statement of each fund they contribute to and/or in other appropriate vehicles.

As required by law, the Foundation must list all donations of \$5,000 or greater, with corresponding donor information, on its tax returns. Donor information is redacted in the public versions of these tax returns.

**Memorial/Honor Gifts:**

The names of donors of memorial or honor gifts may be released to the honoree, next of kin, or appropriate member of the immediate family, unless otherwise specified by the donor in writing. Gift amounts are not to be released without the express consent of the donor.

**Anonymous Gifts:**

The President and CEO are authorized to accept anonymous gifts to the Foundation. In the event the President or CEO is uncertain about the desirability of accepting an anonymous gift, s/he shall consult with the Executive Advisory Committee of the Board.

**Employee Responsibilities:**

The Foundation and its employees have an ethical and legal obligation to respect the privacy of our donors, and to protect and maintain the confidentiality of all information about the donors, their family members and friends.

Employees may not discuss donor records and donor-related business (including the names of donors or amounts of gifts) with anyone outside of the Foundation's board or staff unless the President or CEO has given written authorization for them to do so.