



## **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 clarify the Foundation’s Policy on anonymity and donor and prospect records. “Records” refers to 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 Officer (“CEO”) shall be responsible for maintaining the confidentiality of donor and prospect records. At their discretion, they may make all or part of any record available to staff members or Foundation volunteers to help them in fulfilling their job responsibilities.

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 to outside organizations the donor lists of any fund held by the Foundation for any purpose without the express written approval of the CEO.

#### **Publication of Donor Names and Gift Amounts:**

Unless a donor requests anonymity, the names of all donors and their gift amounts will be listed on the fund statement for the fund to which the gift was made. This information will be visible to fund advisors. No contact information will be shared with fund advisors unless the donor explicitly requests release. As required by law, the Foundation must list all donations of \$5,000 or greater, with corresponding donor information, on its required annual tax returns. Donor information is redacted in the public versions of these tax returns.

*Approved by Donor Engagement Committee on 2.23.26*

**Gifts Received through Fundraising efforts on Behalf of a Foundation Fund**

The donors' names, , and amount contributed as a result of fundraising efforts to benefit a fund held by the Foundation will be released to the fund's advisor, unless otherwise specified by the donor in writing. Contact information may be released with a donor's explicit permission.

**Memorial/Honor Gifts:**

The names of donors making 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 will be listed on the fund advisor portal unless the donor specifies their gift should be recorded as anonymous.

**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 CEO has given written authorization for them to do so.