



Southwest Florida Community Foundation, Inc.

Confidentiality Policy

The nature of the Foundation's role as a funder, leader, convener 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, and to protect its capacity to gather data necessary to make those decisions, the Foundation subscribes to specific policies on confidentiality.

Community Foundation trustees, directors, committee members, staff and volunteers should not engage in private discussion of Foundation matters (except when engaged in the business of the Foundation) or allow the dissemination of Foundation documents or meeting materials.

- The positions or statements of individual trustees, directors, committee members, or staff should not be discussed outside of official Foundation meetings and processes.
- Content of Foundation business, including documents or Foundation analysis of documents, should not be discussed or shared outside official meetings and processes, except as required by law.
- These Confidentiality Policies as are applicable to the Foundation officers, staff, Trustees, and voluntary persons of the Foundation shall also apply to all donors and prospects of the Foundation, including but not limited to Donors' Funds, Agreements, distribution information, and any related matters and shall remain confidential to the Foundation without the explicit approval of the Donor.
- Individuals subject to this confidentiality policy are responsible for ensuring that others acting on their behalf (such as family members or staff) also adhere to this policy.

I agree to comply with the Community Foundation's Confidentiality Policy as outlined above.

Signed: _____ Date: _____

Printed Name: _____