



Subject: Confidentiality Policy
Section: Administration
Board Approval:

Confidentiality Policy

“Confidential Information” shall mean: (1) any Foundation information regarding an individual or corporate Foundation donor, including but not limited to, donor records, lists, addresses, assets, trusts, family data, estate or tax information, charitable giving history, or gifts to or services provided for donors by the Foundation; (2) all non-public financial information concerning the Foundation, including but not limited to, salaries paid to employees, spending policy projections, investment and similar information; (3) all plans and projections for new or developing resources of the Foundation, including marketing and fundraising techniques; (4) all information relating to the Foundation’s resource development activities, employee lists, personnel matters, trade secrets and other confidential or proprietary information; (5) information obtained as part of the grant review process; or (6) any of the information described in subsections (1) through (5) of this paragraph that the Foundation obtains from another party or entity and that the Foundation treats or designates as confidential or proprietary information, whether or not such information is owned or was developed by the Foundation.

Except to the extent that the use or disclosure of any Confidential Information is required to carry out my assigned duties as an employee, contractor, or volunteer of the Foundation, during the term of my employment or participation and after my separation from employment or participation with the Foundation, for whatever reason, I agree that I will not misappropriate, nor without prior written approval by an officer of the Foundation: (1) use for the purpose of competing with the Foundation, either directly or indirectly, (2) disclose to any third party, either directly or indirectly, or (3) aid anyone else in disclosing to any third party, either directly or indirectly, all or any part of any Confidential Information, regardless of whether or not developed by me during the course of my employment or participation with the Foundation.

Name: _____

Signature: _____

Date: _____