



## Confidential Information Policy

### Purpose

To define the guidelines for sharing Foundation confidential information both internally and externally.

### Definitions

Underlined words indicate a separate policy for that subject.

### Method

1. While working for the Foundation, an employee may learn information about internal processes, certain financial information, constituents, partners, programs, incentives, award winners, etc., or fellow employees that is considered confidential.
  - 1.1. Confidential information includes, but is not limited to, any information that is not routinely shared externally (outside of the Foundation) or internally (outside of a specific group or person). Some examples are: internal only budgets and projections, certain constituent account and donation information, a constituent's tax ID, Employee's home address and phone number, Employee salary and benefits information, and any information received from an outside entity that is covered by a non-disclosure agreement.
2. Any knowledge obtained while working for the Foundation should be discussed only with fellow employees who have a need to know such information and outside contractors (accountants, attorneys, etc.) who have a need to know such information in order to perform their contracted duties.
3. All requests for verification of past or current employment must be directed to Human Resources. All verification of employment requests will be limited to dates of employment and job title.
  - 3.1. With a written consent from an Employee, additional information may be released as designated.



4. If a business need to share confidential information with a partner or other organization exists, then permission from the Executive Director and/or a non-disclosure agreement must be signed with the receiving party prior to the release of that information.

Name of Employee (Print): \_\_\_\_\_

Signature (of Employee): \_\_\_\_\_

Date: \_\_\_\_\_