

North Carolina Community Foundation Confidentiality Policy

I. OVERVIEW

The North Carolina Community Foundation (NCCF) recognized 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, Affiliates, or volunteers on a confidential basis.

NCCF and its Affiliates have an ethical obligation to respect the privacy of its donors, and to protect and maintain the confidentiality of all information about its donors, their family members, and friends in the course of providing services to them.

Donor records are protected confidential records. Donor records and donor-related business should not be discussed with or disclosed to anyone except: Donors, NCCF staff members who are specifically authorized to have access to such information, a person authorized by the donor to obtain information about the donor, or any person with whom NCCF has authorized the sharing of the information.

It is unethical and a violation of NCCF policy to discuss donor matters with friends, spouses, relatives, or anyone else, except those persons listed above, unless ordered to do so by a court or otherwise required to do so by law.

Violations of NCCF's Confidentiality Policy are considered very serious, and may result in disciplinary action, up to and including dismissal for employees or removal from the Board for Board members.

COMPLIANCE STATEMENTS

Each director, officer, Affiliate board member, committee member, staff member and consultant shall sign a statement which affirms that such person:

- a. Has received a copy of the confidentiality policy,
- b. Has read and understands the policy, and
- c. Has agreed to comply with the policy.