



## LONG BEACH COMMUNITY FOUNDATION

### CONFIDENTIALITY POLICY

The Long Beach Community Foundation (“Foundation”) is committed to the protection of all confidential information related to its donors, fund holders, grantors, grantees, and any affiliated entity involved in the regular business activities and operations of the Foundation.

Board members, officers, and Foundation staff members must exercise good judgment and care at all times to avoid unauthorized or improper disclosures of confidential information. Conversations in public places should be limited to matters that do not pertain to information of a sensitive or confidential nature.

Confidential financial and investment information may not be used for personal gain. The Foundation is a significant private investor and receives substantial confidential information in the performance of its investment, gift acceptance and stewardship obligations.

#### Policy

Each Board member, officer, and Foundation staff member shall execute the Confidentiality Statement upon employment or appointment to the Foundation Board.

Foundation records, including records of donors, fund holders, grantors, grantees, and affiliated entities will be treated as confidential and not disclosed or distributed except as set forth below and are never allowed to leave the office, except as necessary to accomplish the business of the Foundation.

No Board member, officer, or Foundation staff member may disclose, divulge, or make accessible confidential information belonging to, or obtained through, their affiliation with the Foundation to any person (including friends, relatives, and business or professional associates) other than to persons who have a legitimate need for such information and to whom the Foundation has authorized disclosure.

No Board member, officer, or Foundation staff member shall use such confidential information for personal purposes or transmit such information to others except in the course of his or her duties on behalf of the Foundation.

Foundation information, including Foundation records and copies of and excerpts from those records may not be used by, disclosed to, or discussed with anyone except –

- coworkers who are specifically authorized to have access to and need such information as a part of their Foundation responsibilities;
- that worker’s supervisor;
- the President;

- a person authorized by the donor, fund holder, grantor, grantee or affiliated entity to have access to this information;
- as ordered by a court;
- or as otherwise required by law.

Foundation representatives must take reasonable steps to safeguard all Foundation information – including storing and communicating it in a manner that will protect it from unauthorized disclosure.

This executed statement shall remain in effect throughout employment or Board service. In addition, it will survive beyond the active relationships for the protection of any proprietary information.

I have read and understand the Foundation’s Confidentiality Policy and agree to abide by its terms:

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

BOARD MEMBER     STAFF    *(Check which applies)*