



OTSEGO COMMUNITY
FOUNDATION

CONFIDENTIALITY POLICY

Any information about the Otsego Community Foundation, its donors, prospective donors, grantees, and grant applicants, and any personal information about employees or other confidential information obtained as a result of employment, board membership or volunteering, for the Otsego Community Foundation, should be considered confidential and should be discussed only as required in connection with the Foundation's work.

All documents, files, and working papers of the Foundation, or generated in connection with the work of the Otsego Community Foundation, are the property of the Foundation. Under no circumstances is information concerning donors, prospective donors, grant applicants and grantees, or other confidential information to be revealed to third parties, except as is required by law, or as approved by the Executive Director in writing.

Employees, board members and other volunteers are expected to exercise care not to disclose confidential information unintentionally by indiscreet conversation or by careless handling of sensitive documents. Due to the confidential and sometimes sensitive nature of our funds, please refer all questions about the balance in any fund, donors to a fund, etc., to the Executive Director. Do not answer the questions yourself. If the Executive Director is not available and if there appears to be a time-critical element to the inquiry, please refer the inquiry to the Foundation Treasurer or the Chairperson of the Board of Directors, who will then decide the proper response (which might be to wait until the Executive Director is available!).

Any employee, board members and other volunteers who purposely, or through a failure to exercise reasonable care, causes confidential information to be disclosed, will be subject to disciplinary action, up to and including termination.

The obligation to keep information confidential continues even after an employee, board member or other volunteer ceases to be associated with by the Otsego Community Foundation.

Revisions adopted on July 12, 2012

CONFIDENTIALITY ACKNOWLEDGMENT