



The Community Foundation Tampa Bay (“CFTB”) is committed to integrity and fairness in the conduct of all its activities. This Confidentiality Policy should be interpreted and applied in order to achieve CFTB’s objectives. This Confidentiality Policy applies to CFTB employees, Board of Trustees, Committee members, volunteers and other Foundation representatives (each of whom is individually referred to herein as a “representative” or collectively as “representatives”).

### **Donor Information**

CFTB’s mission is to serve donors and thereby stimulate philanthropy. Donors establish charitable funds with varying motivations and for different purposes. Nonprofit organizations establish their endowment funds at CFTB to protect such funds to provide a source of income to serve their charitable purpose in the future and are considered donors of CFTB.

Many donors wish to remain strictly anonymous; some donors wish to maintain a low profile. Each CFTB representative agrees to respect the desires of each donor regarding the degree of publicity that donor wishes. As part of its annual report to the community and in other publications, CFTB will provide philanthropic recognition by listing names and fund size by broad category unless otherwise directed by the donor. CFTB will only release information to the general public or the media about specific grant making with specific permission from the donor or as provided in the fund agreement.

### **Foundation Proprietary Information**

Foundation representatives have an obligation to safeguard information relating to business operations, donors and clients, vendors, employees and volunteers that should be kept private. In addition, the ideas, concepts, services, products and any other information that the Foundation produces are important proprietary assets of the Foundation and require protection from disclosure to and acquisition by unauthorized persons. All such information is confidential unless otherwise specifically stated. Representatives agree that they will not use, publish or disclose such information during or subsequent to their involvement with the Foundation, and that they will preserve the restricted nature of this information.

### **Representative Acknowledgment and Agreement**

CFTB employees shall receive and agree to comply with this Confidentiality policy prior to his or her election or appointment.

All Trustees, committee members, and staff will be provided with a copy of this Confidentiality policy at least annually or more frequently if the policy is materially changed. Upon receipt of the Confidentiality policy, such persons are asked to review, acknowledge receipt of, and agree to comply with, the Confidentiality policy.