



# West Perry Mustang Foundation

## Policy 140: Confidentiality

### Overview

This Confidentiality Policy of the West Perry Mustang Foundation ("Foundation") provides the Foundation's Board Members, officers, staff members, employees, consultants, independent contractors, and volunteers (collectively, "Foundation Personnel") with the Foundation's requirements for handling confidential information.

### Confidentiality

Foundation Personnel may not disclose, divulge, or make accessible any confidential information belonging to, or obtained through their employment or affiliation with the Foundation, to any person, including relatives, friends, and business and professional associates, other than to persons who have a legitimate need for such information and to whom the Foundation has expressly authorized disclosure to in writing.

### Confidential Information

The term "confidential information" includes, but is not limited to, any information obtained through donor prospecting or research, any personal, private, or financial information, and any information related to the Foundation and its activities that is not readily available to the general public. Foundation Personnel shall use confidential information solely for the purpose of performing services for the Foundation.

This policy is not intended to prevent disclosure where disclosure is required by law. Foundation Personnel must exercise good judgment and care at all times to avoid unauthorized or improper disclosures of confidential information. Conversations in public places, such as restaurants and elevators, should be limited to matters that do not pertain to information of a sensitive or confidential nature.

In addition, Foundation personnel must be sensitive to the risk of inadvertent disclosure and must refrain, for example, from leaving confidential information on desks or otherwise in plain view and refrain from the use of speakerphones to discuss confidential information if the conversation could be heard by unauthorized persons. Documents containing confidential information, including but not limited to donor names, addresses and emails, should be shredded or otherwise destroyed when no longer in use, except as defined by other policies.

At the end of any Foundation Personnel's employment or affiliation with the Foundation, he or she shall return to the Foundation, without the need for specific request by the Foundation, all confidential information, including all documents, papers, and other materials, regardless of medium, that may contain or be derived from confidential information in his or her possession or control.



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### Statement of Understanding and Agreement

I acknowledge that during my employment or affiliation with the Foundation, confidential information may be made available to me. Further, I understand that this information is proprietary and critical to the success of the Foundation and may not be distributed or used outside of the Foundation premises or with non-Foundation individuals.

In the event of disaffiliation with the Foundation or termination of my employment at the Foundation, whether voluntary or involuntary, I agree that I will not utilize or exploit this confidential information for my own personal gain, or share it with any other individual, nonprofit agency, or company, and I will promptly return all confidential information to the Foundation following my termination or disaffiliation from the Foundation.

I agree to respect and abide by the terms of this Confidentiality Policy. I further understand and acknowledge that any violations of this Confidentiality Policy could result in removal from the foundation board of directors and/or legal action against me, including but not limited to claims against me for damages and/or injunctive relief.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

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