



COMMUNITY FOUNDATION SONOMA COUNTY Donor Privacy Policy

The essential core of the relationship with the Foundation's donors, and the essence of the trust they place in us, rests on a deep respect for privacy.

In all instances of written exchanges and verbal interactions, the protection of a donor's personal and private information is a paramount responsibility.

This primary principle applies to every member of the Foundation's staff and board of directors, as well as consultants and advisors employed by, contracting with, or volunteering at CFSC or any of its affiliates.

To maintain this essential bond of trust with CFSC donors, each one of us pledges to:

- Discuss a donor's personal, familial and financial information ONLY with persons professionally involved in directly serving that donor.
- Refrain from any transmission, verbal or written, that discloses sensitive information about the donor, his or her family, or any reference to their finances and philanthropy, beyond a clearly defined "need to know" circle, except at the donor's explicit request or permission.
- Decline any request to summarize the status of a donor's fund at the Foundation, including its balance, its grantmaking focus, and its overall standing, except at the donor's explicit request or permission.

The basic, mandatory and guiding principle for every person associated with the Foundation is that the donor's relationship with the Foundation is based on an assurance that the exchange of private and sensitive information is carefully limited, and only those directly involved in serving that relationship are to be privy to the essential details.

Opening a fund, closing a fund, and all the details of maintaining a fund and serving our donors are to be held in this essential spirit.

Any and all questions or matters of interpretation regarding this policy are to be discussed directly with the President & CEO.

Name (print): _____

Signature: _____