

## **Lewis and Clark County Community Foundation Policy on Donor Confidentiality**

The purpose of this policy is to help donors feel connected with Lewis and Clark County Community Foundation at a level that is comfortable for the donor.

A donor is an individual, organization, trust or other entity that has contributed any cash amount, in kind contribution or other asset to LCCF. There are instances when a donor asks to remain anonymous when making a contribution. The LCCF's Gift Acceptance Policy acknowledges this as follows:

All transactions with a donor shall be treated with respect for the donor's privacy and will be held in strict confidence if the donor so desires, subject to legally authorized and enforceable requests by courts and government agencies. Requests for anonymity in annual donor reports and donor listings will be honored, as will requests to remain (publicly) anonymous.

LCCF has adopted this procedure on donor anonymity to insure that it will honor the donor's wishes to the extent possible by the following means:

1. LCCF will confirm in writing a donor's wishes on anonymity.
2. The donor's giving records with LCCF will be marked "anonymous" to prevent lists from including the donor's name and to ensure that staff working with the donor's record will be aware of the donor's wishes.
3. Hard copy files will be marked prominently "anonymous" so that staff working with the file will be aware of the donor's wishes.
4. Donor information will be included, as required by IRS regulations, on Form 990.
5. In all cases, LCCF's president and treasurer will be informed of the identity of a donor.

LCCF will not accept gifts of cash (coin or currency) equal to or greater than \$10,000, which as of the establishment of this policy is the amount set by the federal government for cash reporting purposes, from an anonymous donor but will accept a money order, cashier's check, bank draft, or traveler's check as an anonymous gift provided that the identity of the donor is disclosed to the president or treasurer.

**Approved by the Board of Directors July 17, 2008**

**Lewis and Clark County Community Foundation**