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Section: Administration

Policy No: 2.5

Public Information Policy

PURPOSE: The College Heights Foundation is a Kentucky nonprofit corporation dedicated toward providing assistance and encouragement to deserving students attending Western Kentucky University. This policy is established to define the practices of the Foundation regarding public disclosure of information and the protocols for requesting information held by the Foundation. The Foundation believes that it should be accountable in its operations and its records should be as open to public inspection as **reasonably** possible, while still respecting the privacy rights of donors, prospective donors, Foundation employees, and the students receiving financial assistance. The Foundation strives to provide transparency without compromising its ability to secure and steward funds for its continued success.

RELEASE OF INFORMATION: The records of the Foundation are available for inspection in accordance with the protocols described in **this policy**. The College Heights Foundation is not a "public agency" as defined by KRS 61.870. The Foundation was chartered in 1923 as a non-profit fiduciary and not established, created, or wholly controlled by another public entity. However, the Foundation acknowledges that its work relates closely to the public interest served by Western Kentucky University, and therefore, certain records should be made available for public inspection. The Foundation will comply with information requests unless the requests create an unwarranted invasion of personal privacy designed to obtain information of a personal nature or if such requests are merely to satisfy an individual's curiosity rather than intended to serve the larger public interest.

AVAILABLE INFORMATION: Most records of the College Heights Foundation are available for public inspection. Records available include, but are not limited to:

- Organizational documents, including Articles of Incorporation and corporate bylaws
- Audited financial statements
- Form 990, Return of Organization Exempt from Income Tax
- Board of Directors
- Policies and procedures

- Investment performance
- Information regarding expenditure of funds
- Aggregate gift information

CONFIDENTIAL
INFORMATION:

Confidential information which is not available for public inspection includes, but is not limited to, the following:

- Portions of records that disclose a donor's or prospective donor's personal information including financial, estate planning, or gift planning matters
- Portions of records disclosing the identity of a donor or prospective donor, including the specific form of gift or pledge that could identify a donor or prospective donor, directly or indirectly, when such donor has requested confidentiality in connection with the gift or pledge
- Information relating to fundraising plans and strategies
- Trade secret information and information relating to the business of the Foundation which, if released, could create a competitive disadvantage
- Individual employee information other than name, title and salary
- Individual student information
- Information relating to trusts and annuities administered by the Foundation, except as to actual gifts to the Foundation from such a trust or annuity
- Other information protected by law

It is the intent of the Foundation to make reasonable accommodations for those who wish to examine publicly available information at the sole discretion of the Foundation. Much of the Foundation's public information is available on the website. Additional information may be requested by submitting a request in writing to the Foundation office: College Heights Foundation, 1703 Chestnut Street, Bowling Green, KY 42101.

REQUEST OF
INFORMATION:

Requests for information will be processed in the order received in a reasonable length of time, usually three to ten business days, unless the request is for a large volume of information. If the requested information is available on the Foundation website, the requester will be so notified.

Reproduction and Additional Fees

If an information request requires the retrieval and reproduction of documents, a reasonable per-page reproduction fee applies in most cases. The per-page reproduction fee shall not exceed the actual cost to the Foundation of satisfying the request. The Foundation may also charge an hourly fee for excessive staff time which is required to locate and prepare requested information and to monitor access to information. All fees shall be paid by the requesting party to the Foundation prior to receipt of requested information. Accounts must be settled before additional information is provided.

**PROTECTION OF
PRIVACY:**

This policy sets forth the Foundation's practices with respect to public and confidential information. It is not intended to be and shall not be interpreted as inconsistent with the rights set out in the nationally recognized Donor Bill of Rights, Council for the Advancement and Support of Education Code of Ethics, or the National Committee on Planned Giving Model Standards of Practice for the Charitable Gift Planner, all of which have been adopted by the Foundation Board of Directors. This policy shall not be interpreted as violating any federal, state or local law governing the dissemination of information.

**PERIODIC REASSESSMENT
OF THE POLICY:**

The College Heights Foundation Board of Directors will periodically review this policy. This policy and any future revisions shall be made publicly available on the Foundation's website.