

## Confidentiality Policy

This survey is conducted by Measuring Success on behalf of the California Independent School Business Officers Associations (Cal-ISBOA) to provide perspective on the operations of member schools. It is distributed to survey participants.

The purpose of this policy is to assure survey participants that their school's data will be used with respect and understanding within a limited group of decision-makers at other schools. Schools are more likely to share information with such an understanding, and with the trust upon which it rests.

A fundamental principle is that a school's data belongs to the individual school. Each school should control the circumstances and context upon which its data is used and disseminated.

Each participating school uses this survey with the following understanding:

1. The data of this survey is for the sole use of the business officers, senior administrators, and the board of trustees of participating schools.
2. Unless available in the public domain, the specific data of other schools will not be used outside of the group described in #1 without the express consent of the school(s) which provided the data.
3. Senior administrators and trustees with whom this survey is shared will be instructed as to its confidentiality guidelines.
4. General summary data - such as averages, medians, and percentiles - may be shared with other persons in one's school community. This type of information will blend the data of at least several schools, and will not identify the specific data of another school.
5. The specific data of other schools may not be shared with consultants or for-profit firms, and may not be used for any commercial purpose.

Please refer to the following examples for additional information:

### **Example A**

You receive a request from the head of school for a copy of the survey. Before sharing the survey in electronic form, the business manager (you) should impress upon the head the confidentiality guidelines of the survey. You should be assured of the head's understanding and active assent before forwarding the Excel file. In some cases it may be safer to have a meeting to review the survey results using a computer projection screen. Be careful about distributing the electronic file! It can take on a life of its own once it is out of your control.

### **Example B**

You receive a request from the chair of the finance committee for a copy of the survey. You may share any part or all of the survey with a trustee. Be careful. See the answer to Example A.

### **Example C**

After your presentation to the chair of the finance committee, she asks you to share the survey with the whole finance committee. A presentation on computer projection screen to the finance committee is fine. Explain the confidentiality agreement. Do not send the electronic file to the committee members -

it is too large a group. If at the meeting you use a handout using the specific data of other schools by name, collect the copies at the end of the meeting. The committee will understand.

#### **Example D**

You wish to make a presentation to a committee of administrators at your school. This is fine. Do not send the electronic file to the group. Collect handouts after your presentation.

#### **Example E**

After your presentation to the administrative group, the director of advancement asks if it is okay to publish an article in the alumni bulletin using some of the survey data of five peer schools. This will help to stimulate the annual fund and capital campaign. You explain this use of the information is not permitted. However, if you wish to assist the advancement office, you may call the business managers at these five other schools and ask their permission to use specific data for a specified purpose. These calls are rare because they take a lot of work and have a good chance of rejection.

#### **Example F**

The school's outside auditor asks for a copy of the survey as part of its effort to ascertain that management is using best practices to run the school. Fire up the survey on your computer or a projection screen to show the auditor that you have good comparable information on the industry and you are a good steward of the school's resources. Do not share the individual data of other schools with your auditor.

#### **Example G**

A consultant engaged to assist your school in the formulation of its long-range strategic plan asks you for a copy of the survey. Again, you decline this request. The survey may not be shared with outside consultants. You ask your ISBOA group if it is willing to allow you to share the survey with a key consultant for a mission-critical purpose. This kind of request is rare, but there may be a time and place for it. You should explain to ALL of the members of the ISBOA that the consultant will sign a confidentiality agreement which specifically limits the use of the data to the planning work for your school, and the consultant agrees to return and delete the information upon completion of the work at your school. Can you get all survey participants to agree to this request? Maybe not. It may be better to pare down the survey results to 10 peer schools - and to make this request to these 10 schools. You may share with the consultant only the data of schools which specifically agree to the stated use of the information.

#### **Example H**

The faculty compensation committee asks you for salary information from the survey. You may present summary data such as averages, medians, and percentiles. You may not share the specific information of other schools without each school's express consent. It is advisable to limit your presentation to a computer projection screen or information on paper. Collect the handouts at the end of the meeting.

#### **Note**

For their part, Measuring Success will treat the survey data as confidential. They will not share any of the data with other consultants or for-profit firms, or use it for any commercial purpose. Measuring

Success may use summary data which is not identifiable by school in their work with organizations closely associated with independent schools (such as NBOA and NAIS) and other independent school groups and associations. Any other use of the data by Measuring Success may be done only with the specific permission of Cal-ISBOA.