



Conflict of Interest Policy

Fulcrum Nonprofit Leadership, LLC

Effective Date: January 22, 2024

1. Purpose

The purpose of this Conflict of Interest Policy ("Policy") is to ensure that the decisions and actions of members of Fulcrum Nonprofit Leadership, LLC are made in the best interests of the organization and its mission, free from personal, professional, or financial conflicts of interest.

2. Definition of Conflict of Interest

A conflict of interest arises when a member has a personal, professional, or financial interest that could compromise or reasonably appear to compromise their ability to act in the best interests of Fulcrum Nonprofit Leadership, LLC.

3. Disclosure of Conflicts

- a. Annual Disclosure: Each member shall annually disclose to the organization any potential conflicts of interest.
- b. Immediate Disclosure: Members are required to promptly disclose any potential conflicts of interest that may arise during the course of their membership.

4. Review and Evaluation

- a. Review by Executive Committee: The Executive Committee or designated committee shall review all disclosures of potential conflicts of interest.
- b. Recusal from Decision-Making: Members with a conflict of interest shall recuse themselves from discussions or decisions related to the matter in question.

5. Procedures for Addressing Conflicts

- a. Identification: Members shall make a good faith effort to identify situations that could give rise to a conflict of interest.

- b. Resolution: In the event of a conflict, the Executive Committee or designated committee shall determine an appropriate resolution, which may include recusal, modification of the organization's plans, or other corrective actions.

6. Confidentiality

All disclosures and discussions related to potential conflicts of interest shall be kept confidential to the extent possible while still addressing the conflict appropriately.

7. Records Retention

The organization shall maintain records of all disclosed conflicts of interest, the actions taken to address them, and the decisions made.

8. Annual Review and Certification

- a. Annual Review: The organization shall conduct an annual review of this Policy to ensure its effectiveness.
- b. Certification: Members shall annually certify their understanding of and compliance with this Conflict of Interest Policy.

9. Consequences for Non-Compliance

Violations of this Policy may result in disciplinary actions, including but not limited to warnings, suspension, or termination of membership, as determined by the Executive Committee.

10. Contact Information

For questions regarding this Conflict of Interest Policy, please email us at hello@fulcrumleader.com.