

**Records Information**

**Release Policy and Confidentiality Statement**

***Statement of Purpose***

The University of Idaho Department Of Advancement Services (UI Advancement Services) maintains gift records and information about donors or prospective donors for the University of Idaho Foundation, Inc. (UI Foundation). Such information is the property of the UI Foundation. UI Advancement Services also maintains university information about alumni and university friends in accordance with the general needs and expectations of the university community. This information is intended exclusively for purposes related to the advancement, fundraising and stewardship efforts of the University of Idaho (UI) programs.

***Release Policy***

UI Advancement Services supports the ongoing activities of the UI by providing assistance for programs, communications, and events that bring together alumni, donors, and friends of the UI. The following policies have been developed to provide the best possible service to those with legitimate needs for such information, and at the same time maintain the confidentiality entrusted by our friends. These policies will apply to every request for information.

1. **Information maintained by UI Advancement will be provided to UNIVERSITY BOARD APPOINTED DESIGNEES of the following entities FOR APPROVED PURPOSES under conditions outlined below in Section III:**
   1. UI affiliated units, organizations and alumni constituent groups, in support of approved activities (Section III), including but not limited to:
      1. Office of Alumni Relations
      2. Alumni constituent groups chartered by the Alumni Association
      3. Development
      4. Administrative Offices
      5. Academic Offices
      6. Athletic Offices
      7. UI Advancement Board Members
   2. Other colleges and universities seeking the location of alumni with degrees from both the UI and the requesting institution.
   3. Law enforcement and student loan agencies.
   4. Agencies that assist in locating UI's "lost" alumni (e.g. USPS Locator Service).

*Please Note: Questions about whether an organization has a legitimate affiliation with the UI will be resolved by the Vice President for Advancement or his/her designee.*

1. **The following conditions apply to the release of information:**
   1. Records coded "Do Not Release" indicating the alumnus or alumna has requested the university not release information or not contact them.
   2. Requests for information from members of the media must be referred to the University Communications and Marketing Office.
   3. Requests for information under the Idaho open records law are to be referred to the Vice President for Advancement for evaluation and response.
   4. "Directory Information" about alumni will be provided to those requestors identified in Section I (page 1) of this document. Directory information is limited to:
      1. Full name
      2. Address and/or telephone number
      3. Degree(s) and date of degree(s) awarded by the UI
      4. College(s)/Department(s) from which degree(s) was/were granted with major field of study
      5. E-mail address
   5. Federal law (FERPA) restricts the information outside “Directory Information” that can be released about current students. No information outside of those created for a student based on the student’s giving/donating will be released based on data maintained by UI Advancement. All requests for information on current students outside of giving/donating should be submitted to the Office of the Registrar.
   6. Information provided to volunteer alumni constituent groups will be limited to those alumni who are affiliated with the requesting group unless approved by the Vice President for Advancement or his/her designee.
   7. In addition to "Directory Information," requests from the UI Alumni Association, development, and other administrative, academic, or athletic units with a legitimate business related reason will be provided the following information.
      1. Employment
      2. Family members
2. **Appropriate internal uses of information include but are not limited to:**
   1. UI Advancement will make available information from its database for the support of approved, university-related activities. Approved activities include:
      1. Advancement
      2. College/department communications to alumni/constituents
      3. Other as approved by the Vice President for Advancement or his/her designee

* 1. Information maintained by UI Advancement is not available for release for non-related commercial or political purposes.
  2. *Questions about what constitutes an approved activity will be resolved by the Vice President for Advancement or his/her designee.*
  3. If the information provided will result in the preparation of lists or directories that are to be published in book, magazine, newsletter, or other forms for general distribution among alumni groups, prior to publication, each individual who might be included must be provided the opportunity to indicate in writing whether he/she wishes to be excluded.
  4. Requestors of data from UI Advancement may contract the services of outside vendors (e.g. data processing consultants, direct mail firms, marketing and merchandise firms, etc.) to process and/or distribute information obtained from UI Advancement. In these cases:
     1. The vendor must agree to use the information only for the purpose intended by the university client. The sale or transfer of the information by the vendor is strictly prohibited.
     2. If the project in question results in the publication of directories or lists as identified in Ill. C above, the procedures outlined in Ill. C must be followed prior to publication.
     3. The vendor must ensure the prompt return of any university owned property or electronic software provided in fulfillment of the contract.
     4. The university client or the vendor agrees to pay any costs associated with systems programming or special data processing that might be required beyond the normal capabilities of the Advancement Services computer system.
     5. In all cases involving the use of outside vendors or contractors, the absolute confidentiality of the information provided from the Advancement database is the responsibility of the requestor.

1. **Data Access for Temporary Help (IH) and Interns.**
   1. Advancement/development temporary help and interns requiring access to gift records and information about donors or prospective donors will be given access to a folder in the advancement shared drive specifically created to house limited donor information for IH and interns to use in the assignment of their work duties as approved by the Associate Vice President for Development and the Associate Vice President of Advancement Services and will also be given. Any request for access outside of this limited scope will need to be submitted to the Associate Vice President for Advancement Services for review and approval.
2. **Approved formats available for distribution of information.**
   1. Upon establishing appropriate identification and affiliation as a member of one of the approved constituent groups (Section I. A), the approved constituent must exercise reasonable effort to secure and protect from disclosure any confidential information downloaded to or stored on any type of electronic device (e.g., computer, mobile device, etc.) or peripheral (e.g., memory card, external hard drive, etc.). Data downloaded from Advancement’s database of record must be deleted when no longer needed.
   2. The secured download and transfer of gift records and information about donors or prospective donors will be through the secured channels by means of user systems of the University of Idaho Customer Relationship Management (CRM) software and/or the university managed advancement shared drive. Emails or other unsecured forms of data transfers are discouraged unless approved University ITS email encryption software or a Secure File Transfer Protocol (SFTP) is used to ensure data security. *Please contact* University ITS *to inquire about email encryption or SFTP if so desired.*
   3. It is the responsibility of the unit requesting information to maintain the absolute confidentiality of that information as specified in this policy statement.
3. **Compliance with the above policy**
   1. Failure to abide by any of the policies stated within this document may result in denial of access to information contained in the Advancement Services database(s), disciplinary action, and in severe cases, termination of employment. Request for re-instatement of access to this information must be approved by the Vice President for Advancement or his/her designee and must include written assurance of future compliance with these policies.



**Employee Confidentiality Statement**

I, the undersigned, have read and understand the policies regarding the use of confidential information. I agree to use the information provided to me only for approved purposes.

I, also, understand that in the course of my work activities I may have access to documents, data, or other information that may be confidential and/or privileged from disclosure, whether or not labeled or identified as such.

Except as required by my activities, I shall never, either during or after my employment with the University of Idaho, directly or indirectly use, publish, discuss, disseminate, or otherwise disclose to any third party, or use for personal gain, any information acquired in the course of my university activities. I, also, understand that all information downloaded should be destroyed after use and new information should be downloaded to maintain refreshed data integrity.

I understand that my adherence to this agreement is fundamental to my continued employment with the university, and that any breach of this confidentiality agreement by me may result in disciplinary proceedings, including termination of employment, by the university. Furthermore, I understand that the use of the information for political or commercial purposes is strictly prohibited.

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| **Employment Type** | **(X) Applicable** |
| Board Appointed |  |
| IH/Temp |  |
| Student/Intern |  |
| Other |  |

|  |  |
| --- | --- |
| **Advancement Access Requested** | **(X) Applicable** |
| Advancement Share Drive (includes Thank You Report) |  |
| Advancement VandalWeb |  |
| CRM Advance |  |

Briefly describe why you have requested access: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Budget/Index Code for CRM Advance Access: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee Name/Title *(please print*) Signature Date

College/Unit Senior Development Director (*if applicable*) Signature Date

\*\*College/Unit Dean/VP/Designated Authority Signature Date

(\*\**Only In Cases Where College/Unit Does Not Have A Development Director*)

Associate Vice President for Development Signature Date

Associate Vice President for Advancement Services Signature Date