

# Advancement | UCF Foundation, Inc.

## Internal Data/Information Sharing Policy

Policy# 5.00

Effective Date: 06/28/2022

Responsible Department: Administration

### 1. PURPOSE

University of Central Florida Foundation, Inc. (Advancement) seeks to protect its proprietary constituent and financial information. However, Advancement recognizes that there are unique situations where it may be in its best interest to share such data with internal, external, and public audiences. This policy seeks to address the types of information or data that may be delivered based on the business purpose or activity of the requestor. Advancement is responsible for maintaining data used to facilitate ongoing contact and communications between the university and its constituents. Constituent is generally defined as alumni, donors, prospective donors, volunteers, and employees. Advancement owns and is responsible for overseeing the use and distribution of all constituent data.

### 2. APPLICABILITY

University employees acting on behalf of Advancement, as well as University or Advancement volunteers.

### 3. POLICY

- A. Defined Audiences. "Internal Requestors" will refer to those requestors who are University employees acting on behalf of Advancement. "External Requestors" will refer to those requestors who are affiliated UCF boards or task forces, Alumni Chapter and Club leadership, volunteers, or University employees who are not acting on behalf of Advancement.
- B. Process.
  - (i) Internal Requestors. Internal Requestors may request constituent or financial information or access this information on demand through various channels available to Advancement employees or University employees acting on behalf of Advancement, including but not limited to the UCFIT ticketing system, Microsoft Teams, relationship management databases, shared files, printed materials, donor files, and email communications. Internal Requestors must sign a confidentiality agreement that covers the access to and use of Advancement data and information before any data or access to it is granted. The agreement may be renewed on an annual basis.

- (ii) External Requestors. External Requestors who request such information need to do so through a designated Advancement employee ("Staff Sponsor") who will accept responsibility for the appropriate use of the shared information. Prior to review, External Requestors will be required to review this Internal Data/Information Sharing Policy, as well as execute a copy of the Volunteer Confidentiality Agreement, which will be maintained in the Advancement records.

The recipient of any Advancement information agrees to ensure that all information received, regardless of format, is handled and stored securely to prevent access by unauthorized persons by following the guidelines for Restricted Data delineated in UCF Policy 4-008.2 Data Classification and Protection unless otherwise specified at the time of delivery or pull of the data. At the conclusion of the activity that warranted the request, the recipient of the information agrees to return all information to the Staff Sponsor and/or dispose of the information.

C. Delivery Medium. Constituent and financial information may be shared in a variety of mediums, to be determined by the business purpose activity. Advancement Services is responsible for maintaining business procedures and documentation that outline how information may be shared. Information may not be shared with any third party, except in cases of working with an approved vendor, or reproduced for any reason by the requestor. It is the responsibility of the Staff Sponsor to whom the information is delivered to ensure that the recipients are in compliance with this policy. Though diligent efforts are taken to maintain data hygiene, Advancement does not guarantee the accuracy of any of its information, and upholds the constituents' right and opportunity to choose not to receive communications from Advancement by opting out of communications.

D. Public Records Requests. Nothing contained herein shall be deemed to circumvent or replace the requirements for a public records request.

#### 4. CLARIFICATION

Requests for clarification of this policy should be sent to the Associate Vice President for Advancement Strategy and Chief Operating Officer

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Name: Rachel Schaefer

Title: Associate Vice President for Advancement Strategy and Chief Operating Officer

Revision History:

Adoption Date: 06/28/2022

Revised: 06/01/2022

History: