

# Advancement | UCF Foundation, Inc.

## Confidentiality of Records Policy

Policy# 6.01

Effective Date: 09/22/2022

Responsible Department: Legal Department

### 1. PURPOSE

To comply with Florida law, as well as appropriately balance the need for donor confidentiality and the interest in public accountability in relation to University of Central Florida Foundation, Inc. (UCFF) records.

### 2. APPLICABILITY

All records of UCFF.

### 3. POLICY

Pursuant to Florida Statutes Section 1004.28, UCFF records, other than those identified below, are confidential and exempt from Florida public records laws. Upon receipt of a specific request in writing, UCFF will provide, where allowed by law, documentation regarding completed business transactions, and information about the management of UCFF assets. All information will be furnished in accordance with Florida law. The following UCFF records are non-exempt public records and will be made available in response to a request: the auditor's report, management letter, records related to the expenditure of state funds, and financial records related to the expenditure of private funds for travel.

UCFF will not release personal or financial information about a donor, prospective donor, alumnus, volunteer, or employee. All fundraising records in possession of any University staff, faculty, or student, or any volunteer acting on behalf of UCFF are considered UCFF records and are confidential and exempt from the public records laws.

### 4. CLARIFICATION

Requests for clarification of this policy should be sent to the Legal Department.

**Rachel Schaefer**

Digitally signed by Rachel Schaefer

Date: 2022.09.26 08:19:28 -04'00'

Name: Rachel Schaefer

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

Revision history:

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