



BOISE STATE UNIVERSITY

University Policy 11050

Donor Records

Effective Date

July 2011

Responsible Party

Vice President for University Advancement, (208) 426-3276

Scope and Audience

This policy applies to all donor records.

1. Policy Purpose

To establish a uniform donor records policy.

2. Policy Statement

Upon the request of the University President or Vice President for University Advancement and subject to the agreements and covenants set forth below, the Foundation will from time-to-time, disclose Foundation Confidential Information in verbal or written form or on electronic, magnetic or other media about past, current or prospective donors, including identifying information, giving history, past involvement with the University, cultivation and solicitation strategies, and other information.

3. Responsibilities and Procedures

3.1 Procedure

- a. The communication of Foundation Confidential Information to the University and its employees is not required by law, is at the discretion of the Foundation, and would not be

made by the Foundation if such data and information, upon disclosure to the University, were to thereby be determined to become property of the University and/or otherwise available for public examination. The University agrees that all Foundation Confidential Information disclosed to the University is and shall remain the proprietary and confidential information of the Foundation and shall be used solely for purposes authorized by the Foundation consistent with its mission.

- b. Preserving the confidentiality of the Foundation's Confidential Information is paramount to the effectiveness of the Foundation in carrying out its purposes. Public disclosure of Foundation Confidential Information violates the need for discretion and confidentiality inherent in the Foundation's management of donor personal information, and could irreparably damage the donor. Therefore, the Foundation's consent to treat any Foundation Confidential Information that may be disclosed to the University, as a public record, is specifically denied.
- c. If, at any time or for any reason, any Foundation Confidential Information disclosed to the University cannot be kept legally confidential, then such information shall be promptly returned to the Foundation.
- d. The University is not the custodian of Foundation Confidential Information.
- e. To ensure compliance with this policy, the Foundation shall clearly identify all information deemed confidential in nature before its disclosure, in any manner, to University representatives.

Revision History