

USF Foundation Data Use and Confidentiality Agreement for USF Employees

The University of South Florida Foundation acts on behalf of the University of South Florida in the management of information regarding gifts and donations to support institutional goals of the University of South Florida. The USF Foundation is committed to the ethical collection and use of information in the pursuit of legitimate institutional goals. Confidential information about donors, as well as confidential information about the institution, in oral form, or on electronic, magnetic, or print media, shall be scrupulously protected so that the relationship of trust between the donors and the USF Foundation is upheld.

Donor records, both hard-copy and electronic, and other related institutional data are highly confidential. Non-public information of this kind must not be discussed with anyone outside the University of South Florida and the USF Foundation, nor may any information or documents be released to a third party without written authorization of the USF Foundation.

Data Use and Confidentiality Agreement

As an individual with a business need for access to confidential USF Foundation records, I acknowledge my understanding of the USF Foundation's confidentiality requirements. I agree to abide by these requirements and deal discreetly with confidential records and information. I understand that inappropriate disclosure of this confidential information will be dealt with in accordance with the regular due process procedures of the University as they apply to faculty, administrators, and staff and may result in disciplinary action up to and including termination of employment. I will respect our donors' right to privacy and avoid disseminating confidential information, including, but not limited to, the following:

1. Sensitive information including donor giving records, research information, and USF Foundation financial data will be protected and treated with special care in accordance with the "USF Foundation Confidential Alumni and Donor Records Policy", attached as an addendum.
2. USF Foundation records and data will not be reproduced, stored in a retrieval system other than that approved by the organization, or transmitted in any form or by any means, electronic, magnetic, mechanical, photocopied, recorded or otherwise.

Signature

NAME PRINTED

College/Campus/Department

Date

USF Foundation Confidential Alumni and Donor Records Policy Addendum

The USF Foundation is committed to maintaining the confidentiality of private information shared with us by our alumni and donors. To assure that documents are labeled, handled and disposed of in a manner that protects that confidential information, the Foundation strongly endorses the prompt labeling, discreet handling/distribution and appropriate disposal of documents with confidential information. This policy applies to all documents, including electronic and print records.

Definition of Confidential Documents

Florida Statutes section 1004.28 establishes the confidentiality of records of the USF Foundation. The USF Foundation Board of Trustees has established the Policy on Confidentiality of Foundation Documents in accordance with the law. In performing your duties, you should treat documents containing alumni or donor information confidential. This includes, but is not limited to, any materials:

- which identify an alumnus' or donor's identity, social security number, and other biographical information
- containing donor contribution information either in summary or detail
- that list multiple names and addresses (i.e. a mailing list)
- that include financial reports for either a single fund or multiple funds
- that include expenditure information

Labeling Policy

All documents (printed and electronic) that contain confidential information, as noted above, will be identified with the following USF Foundation confidentiality statement:

Records of the University of South Florida are subject to disclosure unless exempt by law. Documents made or received by a USF Foundation agent in connection with the transaction of business by the USF Foundation are confidential and exempt from Ch. 119 pursuant to F.S. 1004.28(5) and in accordance with the USF Foundation Policy on Confidentiality of USF Foundation Documents.

This statement helps remind any person who handles the document that it may contain confidential information. This confidentiality statement must be included on all materials including print, e-mail, file sharing, or individually created records, as well as all Banner Alumni/Development and Foundation reports.

Disposal of Documents with Confidential Information

All Foundation documents will be retained at least for the time prescribed by the state's records retention policy. After expiration of the state's records retention period, all documents which are to be disposed of must be shredded, and not disposed of in office trash or campus recycling. If a shredding machine is not available to your office, you must use a shredder located in various departments within University Advancement or the Foundation. Identity theft and other illegal use of confidential information is a serious problem, and each employee has the individual responsibility to shred documents that are ready for disposal. **Hand shredding or using the USF Burn Bin Recycling Program is not appropriate since the security of confidential data cannot be guaranteed.**

Holding of Reports

Just as you would never carry your important personal papers in your vehicle or in view of others, neither should you do so with Foundation documents. Please only transport those reports and files as absolutely necessary for your immediate use.

It is the Foundation's policy to hold alumni, donor and potential donor information with the strictest confidence so that this information will not inadvertently end up in the public domain. As an agent of these reports, it is your responsibility to follow these practices and policy to ensure the security of privileged alumni and donor records.