



**BOISE STATE UNIVERSITY**

University Policy 11050

## Donor Records

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### **Effective Date**

July 2011

### **Responsible Party**

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

### **Scope and Audience**

This policy applies to all donor records.

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## **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**

- a. The communication of Foundation Confidential Information to the University and its employees is not required by law, but is at the discretion of the Foundation, and will not be made by the Foundation if such data and information, upon disclosure to the University, is 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 will remain the proprietary and confidential information of the Foundation and will 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.
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## Revision History