

# Advancement | UCF Foundation, Inc.

## Confidentiality of Records Policy

Policy# 6.01

Effective Date: 11/28/2017

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. records.

### 2. **APPLICABILITY**

All records of UCFF.

### 3. **POLICY**

Pursuant to Florida Statutes Section 1004.28, UCFF records are confidential and exempt from Florida public records laws. In accordance with the BOT's policy <https://bot.ucf.edu/files/2017/03/BOT-DSO-Records-Policy-FINAL.pdf>, UCFF will voluntarily release certain confidential items. Upon receipt of a reasonable and specific request in writing, UCFF will provide financial information such as expenditures from UCFF funds, documentation regarding completed business transactions, and information about the management of UCFF assets. All information will be furnished in accordance with Florida law.

UCFF will not, however, release any record or information that includes personal or financial information about a donor, prospective donor, alumnus, volunteer, or employee. All fundraising activities undertaken by University staff, faculty, or students, or by volunteers, are undertaken on behalf of UCFF. All documents associated with such activities in possession of any University staff, faculty, or student, or any volunteer, are records of UCFF and are confidential and exempt.

### 4. **CLARIFICATION**

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



Name: Michael J. Morsberger

Title: Vice President Advancement and Chief Executive Officer

Revision history:

Adoption Date: 02/15/2005

Revised: 01/28/2011

11/28/2017