



Fort Lewis College
Office of Advancement
Confidentiality Policy and Agreement

Advancement Confidentiality Policy Statement

The Office of Advancement at Fort Lewis College recognizes that efficient advancement operations require the maintenance and management of extensive donor, prospect, and alumni records. Donor records on the computer, voicemails, emails or hard copy files contain sensitive information that is shared with or developed by Advancement on a confidential basis. We have an ethical obligation to respect the privacy of our donors and to protect and maintain the confidentiality of all information about donors. Donor records are protected confidential records and should not be discussed with or disclosed to anyone except colleagues, volunteers, and contract workers who are specifically authorized to have access to such information, any person authorized by the donor to obtain information about the donor, or any person with whom the division has authorized the sharing of the information. Work performed, conversations heard, printed materials read, contact with any contents of the administrative database, and use of public record search utilities owned or subscribed to by Fort Lewis College and the Fort Lewis College Foundation are confidential.

It is unethical and a violation of Advancement policy to discuss donor matters with friends, spouses, relatives, or anyone else, except those persons listed above, unless ordered to do so by a court or otherwise required to do so by law. Violations of the Advancement Confidentiality Policy are considered very serious and may result in disciplinary action, up to and including dismissal for employees.

Compliance

Each employee, temporary employee, contract worker, volunteer, or work/study student shall sign a statement, which affirms that such person:

- a. Has received a copy of the confidentiality policy,
- b. Has read and understands the policy, and
- c. Has agreed to comply with the policy.

Agreement for Employees, Temporary Employees, Consultants, Volunteers, and Work/Study Students

By signing below, I acknowledge that:

- a. I have received a copy of both the Fort Lewis College Advancement Confidentiality Policy and the Donor Bill of Rights.
- b. I have read and understand the policy and
- c. I agree to abide by the policy to the best of my ability in my role as an employee, temporary employee, consultant, volunteer, or work/study student.

I further agree that all confidential information and/or grant files, contribution files, donor records, donor lists, charitable gift information, development data, manuals, letters, contracts, agreements, notes, records, reports, memoranda and all other College materials, documents and data used, prepared or collected as part of my work with the College, in whatever form, are and will remain the property of Fort Lewis College and/or the Fort Lewis College Foundation.

I will not duplicate any work-related document or electronic record for my own use without the permission of the appropriate supervisor/administrator. I will not retrieve, examine or alter any work-related document, file or electronic record except where I am authorized to as part of my work responsibilities.

If I am unsure whether or not a particular fact, matter, document, file or electronic record is covered by this confidentiality agreement, I will preserve the confidentiality of the item in question until receiving clarification from the appropriate supervisor/administrator. Accordingly, I agree that at the end of my relationship with the College, I will destroy or return to the College all College documents and other materials of any kind which constitute or contain any confidential information, in my possession or control, regardless of how stored or maintained, including all originals, copies and compilations and all information stored or maintained on computer, tapes, discs, E-mail or any other form of technology.

Consultant signature: _____ Date: _____

Printed name: _____

The division of Advancement is committed to ensuring the privacy of the Fort Lewis College Foundation constituency, board members, donors, and prospective donors.