

**University of Florida Foundation, Inc. (UFF)
Confidentiality of Foundation Records**

Policy #: 1.03
Effective Date: March 2, 2018
Responsible Department: Legal

1. **PURPOSE**

To appropriately balance the need for donor confidentiality and the interest in transparency and public accountability in relation to UFF records.

2. **APPLICABILITY**

All records of UFF.

3. **POLICY**


As stated and limited in Florida Statutes Section 1004.28, Foundation records are confidential and exempt from Florida public records laws. Upon receipt of a reasonable and specific request in writing, the Foundation will provide financial information such as expenditures from UFF funds, documentation regarding completed business transactions, and information about the management of UFF assets. UFF will furnish this information in a format reasonably responsive to the request, at a reasonable cost to the requesting party.

UFF will not, however, release any record or information that includes personal or financial information about a donor, prospective donor, alumnus, volunteer, or employee, without the individual's express written consent or as required by law. All fundraising activities undertaken by University employees or students, or by volunteers, are undertaken on behalf of UFF. All documents associated with such activities or with advising or serving UFF, whether or not in possession of any University employee or student, or any volunteer, are records of UFF and are confidential and exempt from the Florida public records law.

4. **CLARIFICATION**

Requests for clarification of this policy should be sent to the Executive Director of Legal (sgoffman@uff.ufl.edu).

Certified as approved by the UFF Executive Board on March 2, 2018.



Susan G. Goffman, Secretary

Revision history: Original version
Revised March 2, 2018