

**Office of University Advancement**

**WPI Data Use and Confidentiality Agreement for**

**WPI Office of University Advancement Student Workers**

The WPI Office of University Advancement manages information regarding gifts, donations, biographical data on alumni and friends of WPI to support the institution’s goals. WPI is committed to the ethical collection and use of information in the pursuit of legitimate institutional goals. Confidential information about alumni, donors and friends, 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 alumni, donors, friends and WPI is upheld.

Alumni, donor and friend records, both hard-copy and electronic, and other related institutional data are highly confidential. Nonpublic information of this kind must not be discussed with anyone outside WPI nor may any information or documents be released to a third party without written authorization of WPI.

It is the WPI Office of University Advancement policy to hold alumni, donor and friends 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 confidential alumni, donors’ and friends’ records.

**Data Use and Confidentiality Agreement**

As an individual with a business need for access to confidential WPI records, I acknowledge my understanding of WPI’s confidentiality requirements. I agree to abide by these requirements and deal discreetly with confidential records and information as outlined in this Agreement and the attached Policy Addendum.

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, staff and students. This may result in disciplinary action up to and including termination of employment as a student worker in Development and Alumni Relations. I will respect our donors’ right to privacy and avoid disseminating confidential information as outlined below and in the Policy Addendum:

1. Sensitive information including donor giving records, research information, and WPI financial data will be protected and treated with special care in accordance with the “WPI Confidential Alumni and Donor Records Policy”, attached as an addendum.
2. WPI 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.

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Signature Printed Name Date

Rev. 11/13/12



**WPI Confidential Alumni and Donor Records Policy Addendum**

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

Definition of Confidential Documents

In performing your duties, you should treat documents containing alumni or donor information as confidential. This includes, but is not limited to, any materials:

* which identify an alumnus’, friend’s 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) of alumni and/or donors and/or prospects
* that include financial reports for either a single WPI or multiple WPI funds
* that include WPI expenditure information

Disposal of Documents with Confidential Information

All University Advancement documents will be retained at least for the time prescribed by WPI’s records retention policy. After expiration of WPI records retention period, all University Advancement 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 dispose of the documents in the recycling bin, located in the office that is provided by the outside vendor to collect confidential documents for shredding.

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.

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 WPI documents. Please only transport those reports and files as absolutely necessary for your immediate use.

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