

Alumni, Donor and Gift Data: Guidelines for Advisory Board Members and Volunteers

Thank you for supporting development activities at the University of Wisconsin-Madison and/or UW Health. Your participation in helping our teams identify and contact potential donors is critical to the success of our endeavors. We are grateful for your commitment of time, energy and expertise.

In your role as an advisory board member/volunteer and as a trusted advisor, you will be privy to confidential data about alumni, prospects, and donors. The following guidelines are designed to help ensure that our advisory board members/ volunteers maintain the same exemplary standards of discretion, confidentiality, and donor privacy expected of UW-Madison, UW Health and UW Foundation staff.

The UW Foundation Privacy Policy, which is posted at www.supportuw.org, states: *We do not and will not sell, rent, trade or market personal data about you to third parties. We do, however, share our data with campus partners, the alumni association and select individuals and entities for alumni relations and development purposes.*

As one of these “select individuals,” you are entrusted to utilize this data only for the purpose of supporting a UW-Madison or UW Health development initiative. This data is not to be used for any other purpose, including personal or business purposes, and it is not to be distributed to any external parties.

The lists, reports and other information the UW Foundation provides to advisory board members/volunteers is designed to include sufficient details for your efforts to identify and connect with prospects while also protecting donor privacy. Campus partners and UWF staff will work together to give you customized pre-screened information based on our assessment of prospect/donor capacity, affinity and other important factors, in order to best meet the needs of your project. In general, advisory board members/volunteers are able to see information about individuals that is based on publicly available sources, but advisory board members/volunteers are not provided all details of gifts that individuals have made to the UW-Madison or UW Health.

Under UW Foundation policy, the following information may be provided to you to assist you in your efforts: Name, address, telephone number, e-mail, employment information, educational information, board membership, WAA membership/engagement, Bascom Hill Society membership, and general areas of philanthropic giving/interest around campus. The UW Foundation is unable to provide you with the following information: Total giving to UW-Madison or UW Health, gift amounts to your specific unit or other schools/units, deferred giving information, and donor survey information. Any exceptions to this policy must be approved by the President of the UW Foundation.

We ask that you be discreet and not use the information with which you are provided for any purpose other than assisting the UW Foundation with its effort to raise support for the University of Wisconsin-Madison and UW Health.

Thank you and On Wisconsin!!



University of Wisconsin Foundation
Advisory Board Member/Volunteer Confidentiality Agreement

I, the undersigned, understand that in my capacity as an advisory board member/volunteer for the University of Wisconsin Foundation (“Foundation”) I may be exposed to sensitive and confidential personal and financial information concerning alumni, friends and campus partners. I agree to respect the confidentiality of this information at all times and to only use the information in discharging my duties as an advisory board member/volunteer. I will not use any such information for personal purposes or transfer such information to any third party for any reason.

I understand that violation of this agreement may result in the termination of my relationship with the UW Foundation.

Advisory Board Member/Volunteer Signature

Print Name

Date

