



**Whittier College**  
Office of Advancement  
Confidentiality Policy and Agreement

**POLICY**

The College recognizes that efficient advancement operations require the maintenance and management of extensive donor and prospect records. Donor records on the computer, voicemails, emails, or hard copy files contain sensitive information that is shared with or developed by the Office of Advancement on a confidential basis. Employees and volunteers have an ethical obligation to respect the privacy of our donors, and to protect and maintain the confidentiality of all information about donors, their family members and friends.

Donor records are protected confidential records and should not be discussed with or disclosed to anyone except: co-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 school's administrative database and use of public record search utilities owned or subscribed to by Whittier 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 and termination of volunteer responsibilities.

**Confidentiality Agreement for Employees, Temporary Employees, Volunteers and Work/Study Students**

By signing below, I acknowledge that:

- a. I have received a copy of the Whittier College Advancement Confidentiality Policy,
- b. I have read and understand the policies, and
- c. I agree to abide by these policies to the best of my ability in my role as an employee, temporary employee, 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 Whittier College.

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 or volunteer responsibilities.

I will not email electronic files containing personal information, other than name/email address to anyone outside of the campus intranet. I will use the web-based services to view lists of constituents, and will not permanently store such data on my workstation or laptop computer.

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 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, email or any other form of technology.

Employee/Volunteer signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed name: \_\_\_\_\_

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Supervisor (or Authorizing Administrator) signature: \_\_\_\_\_

Date: \_\_\_\_\_

Printed name: \_\_\_\_\_

***The Office of Advancement is committed to ensuring the privacy of the Whittier College constituency, board members, donors, and prospective donors.***