



VOLUNTEER CONFIDENTIALITY AGREEMENT

In consideration of my volunteer engagement by Temple University – Of the Commonwealth System of Higher Education to provide services to the Office of Institutional Advancement, I will be privy to institutional data such as individual addresses, emails, phone numbers and business information for outreach purposes. As an ambassador of the University, and intending to be bound hereby, I agree to the following:

1. I acknowledge that during my association with the Office of Institutional Advancement I will be responsible for handling institutional data, and I will have access to documents, data or other information, some or all of which may be confidential and/or sensitive and not subject to disclosure, whether or not labeled or identified as “confidential and/or sensitive”.
2. Institutional data, regardless of its format (e.g., electronic, paper, oral), may include, but is not limited to personal information of third parties/clients, documents, notes, client meetings, emails, research, or overheard conversations.
3. Institutional data must be kept private and protected.
4. Treatment as institutional data (during and after volunteering):
 - a. I shall not use institutional data in any way other than for my volunteer duties.
 - b. I shall not disclose institutional data without proper authorization.
 - c. I shall not duplicate or reproduce institutional data without permission.
 - d. I shall treat ALL information accessible to me as private and protected.
5. Violations or adherence to this guideline or other University policies may result in: (i) suspension or revocation of access privileges, (ii) disciplinary action under the relevant policies for faculty, staff, administration, and students, and/or (iii) civil or criminal prosecution under federal and/or state law.
6. All institutional data and computer access will be handled in accordance with University policies and guidelines, whether be electronic or in paper.
7. Except as authorized by my Sponsor/Host or their designee(s) in the Office of Institutional Advancement as part of my responsibilities, I shall never, either during or after my association with the Office of Institutional Advancement, directly or indirectly disclose to any other person or entity any institutional data relating to alumni, prospects, donors or the Office of Institutional Advancement business methods.
8. At no time either during or after my association with the Office of Institutional Advancement will I use institutional data for any purpose outside of the scope of the volunteer responsibilities. I will not contact alumni, donors or prospects for any personal/professional/political fundraising, sales or advancement purposes.

9. I agree that if at any time during my association with the Office of Institutional Advancement I become either a volunteer or a paid consultant for any other organization or institution for which any part of my duties or responsibilities involves identifying, cultivating and/or soliciting potential donors for the organization or institution, I will immediately inform my staff liaison in writing. I understand that because of the potential or actual conflict of interest that may result from my being such a volunteer or paid consultant, the University may, in its sole discretion, terminate my engagement or systems access because of such status.

I have read and understood the associated Volunteer Data Sharing Guidelines (included below). Furthermore, I have been given the opportunity to ask questions about the document's meaning and have been provided with satisfactory answers.

Your signature on the Volunteer Acknowledgement of Roles and Responsibilities agreement indicates that you have read, understand, and agree with the policies and procedures outlined as part of the Temple University Volunteer Confidentiality Agreement.

Institutional Advancement Volunteer Data Sharing Guidelines
Effective Date: February 1, 2023

Purpose:

This document provides employees and volunteers of Temple University's Office of Institutional Advancement with the guidelines around data sharing. We are committed to following local, state, federal and international regulations and laws; the use of institutional data is within the context of business use and need in the pursuit of institutional goals. Volunteers will have access to institutional data that would be defined as a data classification of confidential or sensitive requiring appropriate measures to maintain security and privacy.

Definitions:

Volunteer - Any person who is not a current Temple University employee or student worker who performs services for the University without promise, expectation or receipt of compensation and/or benefits for services rendered.

Sponsor/Host - Any Temple University employee who interacts with, supervises, chaperones, hosts or otherwise oversees a volunteer.

Statement:

Access to institutional data classified as confidential and/or sensitive, such as academic, demographic, donor, contact information, etc. is typically granted only to University staff. However, during instances when Institutional Advancement ("IA") volunteer committees or individuals aid in outreach efforts, IA volunteers may be provided access, as outlined within this policy. Nothing in this document alters obligations set forth in any existing university policies.

IA volunteers are responsible for following the established guidelines regarding the appropriate use of institutional data with the goal of keeping institutional data secure and protecting the privacy of our constituents.

Procedures:

1. University Staff Responsibilities

University staff members who provide institutional data to IA volunteers hold certain responsibilities, as follows:

- Understand and follow the practices for Data Access Allowed and Data Access Limitations as outlined below.
- Sponsors/Hosts shall ensure IA volunteers with access to institutional data have read these guidelines, and have read and signed the *IA Volunteer Confidentiality Agreement*, providing a signed copy to the Associate Vice President of Advancement Operations.

- Provide institutional data only through approved transport and encrypted methods when shared electronically.
- Require volunteers to delete electronic files and shred printed documents once the volunteer's outreach purpose has been fulfilled.
- Immediately report any mishandling of standard volunteer practices to the Associate Vice President of Advancement Operations and to the University Chief Information Security Officer (CISO@temple.edu)

2. IA Volunteer Responsibilities

IA volunteers provided with access to institutional data hold certain responsibilities, as follows:

- Read and follow the *IA Volunteer Data Sharing Guidelines*.
- Read, sign, and follow the *IA Volunteer Confidentiality Agreement*.
- Keep all institutional data private and only share with those who are authorized access to the institutional data
- Only use approved transport and encryption methods when handling electronic data.
- Protect printed data to ensure no unapproved access or use.
- Protect additional personal information gathered by the volunteer.
- Delete electronic files and shred printed data once the outreach role has been completed.

3. Data Access Allowed

IA volunteers may only be provided with limited data about past or current alumni and friends of the University. Permissible access may include but not limited to the following data elements:

- | | |
|-----------------------|---------------------------------------|
| • Name | • Degree received |
| • Street Address | • Awards received (e.g., Dean's List) |
| • Email Address | • Major field of study |
| • Telephone number(s) | |
| • Dates of attendance | |

If updated information is obtained in the course of the work, Institutional Advancement requests that volunteers send updates to the Sponsor/Host as soon as possible.

4. Data Access Limitations

IA volunteers will not have access to all institutional data held within Institutional Advancement's systems. Alumni and friends can choose a variety of opt-out fields; therefore, not every record may appear in shared data.

The following institutional data defined as confidential and/or sensitive may not be shared with volunteers:

- | | |
|---------------------|---------------------------|
| • Date of Birth/Age | • Marital Status |
| • Race/Ethnicity | • Military/Veteran Status |
| • Gender | • Donation Amounts |

Cross Reference:

04.61.13 Visitor and Volunteer Policy and Procedures

04.71.10 Data Usage, Governance and Integrity Policy

03.20.11 Policy Regarding Confidentiality of Student Records

Temple University Privacy Statement