



## University Development Office Policy on Sharing Record Information for Alumni/Development

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### Introduction

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#### **PURPOSE**

This policy is created to guide UNC-Chapel Hill employees on the appropriate sharing of demographic and financial information stored in Davie with external sources - those from outside of UNC-Chapel Hill. Information about alumni, donors and friends in Davie is to be used for individual communications of a personal nature or in service to UNC-Chapel Hill. Use of this information for any commercial, political, or external solicitation purpose is expressly prohibited.

#### **SCOPE OF APPLICABILITY**

All University employees with access to Davie.

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### Policy

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#### **Policy Statement**

This policy is intended for use with small, individual external requests. Requests for reports or data on a large group, (e.g. alumni living in a particular city, donors of a certain amount, etc.) are generally not granted. These requests should be directed to either the Director of Alumni Records & Information Systems at the General Alumni Association or the Associate Vice Chancellor of Business and Operations in the University Development Office.

If a record is marked **CONFIDENTIAL**, no information in that record should be shared.

If a record is marked **ANONYMOUS**, no giving information in that record should be shared.

The following information **CANNOT** be shared:

- Any information on a CONFIDENTIAL record
- Social Security Number (does not exist on Davie record)
- Birth date Gender Ethnic group
- Parents' names and addresses gathered from the student record
- State and/or US Territory from which the student entered the University

The following directory information **CAN** be shared:

- Full name
- Address (home and business)
- Telephone listing
- Preferred e-mail address



- Class
- Major field of study (see notes)
- Dates of attendance (see notes)
- Degrees and awards received (see notes)
- Most recent previous educational institution attended
- Participation in officially recognized activities and sports

### Access to Information in Davie

Person Requesting Information	Directory Information	Relationships	Gifts and Pledges	Planned Giving	Plans and Interactions	Research Information	Student Info
Fundraiser	x	x	x	x	x	x	x
Development Associate	x	x	x	x	x	x	x
Chancellor	x	x	x	x	x	x	x
Dean	x	x	x	x	x	x	x
Other University Staff	x	o	o	o	o	o	x
Development Volunteer Assisting with Fundraising	x	x	x	Ask PG Staff	o	o	FERPA
Donor	x	o	o	o	o	o	FERPA
Nondonor and All Others	x	o	o	o	o	o	FERPA
Report/Media Rep	REFER TO UDO OR SCHOOL/UNIT PR PROFESSIONAL						
x=Allow access							
o=No access							

### Student Information in Davie

Be very careful about how student information is shared. The Family Educational Rights and Privacy Act (FERPA) restricts the external dissemination of student information. All student records maintained by an educational institution are covered by FERPA and penalties for releasing information covered by FERPA are harsh. Generally, directory information may be shared unless the student has asked us to withhold it - those records are marked CONFIDENTIAL in our system. Once a student has invoked FERPA and has a confidential record, we must honor that request until we are asked to remove it by the student/alum. The directory information, during the time it is protected by FERPA, cannot be shared externally. It is appropriate and acceptable for the University to use this information to communicate with the student even if he/she has invoked FERPA protection.

### Notes

1. *Inquiries pertaining to a donor's giving history are assessed on a case-by-case basis with reference to the attached access policy chart.*
2. *Requests for degree information (degree, major field of study, award dates, entrance dates, etc.) are best referred to the Registrar's office to assure that*



*FERPA rules are not violated. The Registrar is the only source for official degree information - do not represent degree information in Davie as official.*

3. *These rules are not intended to apply to commercial vendors who are contracted to assist with development work. Any commercial vendor (e.g. mailing house, data analysis) must sign a non-disclosure agreement before receiving any data.*
4. *Information contained in newspaper clippings, questionnaires, correspondence -- anything gathered after a student leaves UNC -- is not private per FERPA and may be shared.*
5. *If an alumna/us is making the request, please ask him/her to verify his/her own address information to help keep our records updated.*
6. *If you are concerned about the legitimacy of a request, offer to forward a message to the donor/alum as appropriate.*

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**Contact Information**

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**Policy Contact(s)**

Department	Contact	Title	Telephone	Email
University Development Office	David Churchill	Associate Vice Chancellor for Business and Operations for University Development	919.962.3429	<a href="mailto:churchill@unc.edu">churchill@unc.edu</a>
General Alumni Association	Roger Nelsen	Director of Alumni Records and Information Systems	<a href="tel:(919)962-7055">(919) 962-7055</a>	<a href="mailto:roger_nelsen@unc.edu">roger_nelsen@unc.edu</a>