

**SENATE BILL NO. \_\_\_\_\_ HOUSE BILL NO. \_\_\_\_\_**

1 A BILL to amend and reenact § 2.2-3705.4 of the Code of Virginia, relating to the Virginia Freedom of  
2 Information Act; exemption for personal information of beneficiaries and certain other  
3 individuals; Virginia College Savings Plan.

4 **Be it enacted by the General Assembly of Virginia:**

5 **1. That § 2.2-3705.4 of the Code of Virginia is amended and reenacted as follows:**

6 **§ 2.2-3705.4. Exclusions to application of chapter; educational records and certain records**  
7 **of educational institutions.**

8 The following records are excluded from the provisions of this chapter but may be disclosed by  
9 the custodian in his discretion, except where such disclosure is prohibited by law:

10 1. Scholastic records containing information concerning identifiable individuals, except that such  
11 access shall not be denied to the person who is the subject thereof, or the parent or legal guardian of the  
12 student. However, no student shall have access to (i) financial records of a parent or guardian or (ii)  
13 records of instructional, supervisory, and administrative personnel and educational personnel ancillary  
14 thereto, that are in the sole possession of the maker thereof and that are not accessible or revealed to any  
15 other person except a substitute.

16 The parent or legal guardian of a student may prohibit, by written request, the release of any  
17 individual information regarding that student until the student reaches the age of 18 years. For scholastic  
18 records of students under the age of 18 years, the right of access may be asserted only by his legal  
19 guardian or parent, including a noncustodial parent, unless such parent's parental rights have been  
20 terminated or a court of competent jurisdiction has restricted or denied such access. For scholastic  
21 records of students who are emancipated or attending a state-supported institution of higher education,  
22 the right of access may be asserted by the student.

23 Any person who is the subject of any scholastic record and who is 18 years of age or older may  
24 waive, in writing, the protections afforded by this subdivision. If the protections are so waived, the  
25 public body shall open such records for inspection and copying.

26           2. Confidential letters and statements of recommendation placed in the records of educational  
27 agencies or institutions respecting (i) admission to any educational agency or institution, (ii) an  
28 application for employment or promotion, or (iii) receipt of an honor or honorary recognition.

29           3. Records of the Brown v. Board of Education Scholarship Awards Committee relating to  
30 personally identifiable information, including scholarship applications, personal financial information,  
31 and confidential correspondence and letters of recommendation.

32           4. Data, records or information of a proprietary nature produced or collected by or for faculty or  
33 staff of public institutions of higher education, other than the institutions' financial or administrative  
34 records, in the conduct of or as a result of study or research on medical, scientific, technical or scholarly  
35 issues, whether sponsored by the institution alone or in conjunction with a governmental body or a  
36 private concern, where such data, records or information has not been publicly released, published,  
37 copyrighted or patented.

38           5. All records of the University of Virginia or the University of Virginia Medical Center or  
39 Eastern Virginia Medical School, as the case may be, that contain proprietary, business-related  
40 information pertaining to the operations of the University of Virginia Medical Center or Eastern Virginia  
41 Medical School, as the case may be, including business development or marketing strategies and  
42 activities with existing or future joint venturers, partners, or other parties with whom the University of  
43 Virginia Medical Center or Eastern Virginia Medical School, as the case may be, has formed, or forms,  
44 any arrangement for the delivery of health care, if disclosure of such information would be harmful to  
45 the competitive position of the Medical Center or Eastern Virginia Medical School, as the case may be.

46           6. Personal information, as defined in § 2.2-3801, provided to the Board of the Virginia College  
47 Savings Plan or its employees by or on behalf of individuals who have requested information about,  
48 applied for, or entered into prepaid tuition contracts or savings trust account agreements pursuant to  
49 Chapter 4.9 (§ 23-38.75 [LHausenfluck3] et seq.) of Title 23, including personal information related to  
50 (i) qualified beneficiaries as that term is defined in § 23.1-700 [LHausenfluck2], (ii) designated  
51 survivors, or (iii) authorized individuals. Nothing in this subdivision shall be construed to prohibit

52 disclosure or publication of information in a statistical or other form that does not identify individuals or  
53 provide personal information. Individuals shall be provided access to their own personal information.

54 For purposes of this subdivision:

55 "Authorized individual" [VWagner] means an individual who may be named by the account  
56 owner to receive information regarding the account but who does not have any control or authority over  
57 the account.

58 "Designated survivor" means the person who will assume account ownership in the event of the  
59 account owner's death.

60 7. Records maintained in connection with fundraising activities by or for a public institution of  
61 higher education to the extent that such records reveal (i) personal fundraising strategies relating to  
62 identifiable donors or prospective donors or (ii) wealth assessments; estate, financial, or tax planning  
63 information; health-related information; employment, familial, or marital status information; electronic  
64 mail addresses, facsimile or telephone numbers; birth dates or social security numbers of identifiable  
65 donors or prospective donors. Nothing in this subdivision, however, shall be construed to authorize the  
66 withholding of records relating to the amount, date, purpose, and terms of the pledge or donation, or the  
67 identity of the donor unless the donor has requested anonymity in connection with or as a condition of  
68 making a pledge or donation. The exclusion provided by this subdivision shall not apply to protect from  
69 disclosure (i) the identities of sponsors providing grants to or contracting with the institution for the  
70 performance of research services or other work or (ii) the terms and conditions of such grants or  
71 contracts.

72 8. Records of a threat assessment team established by a public institution of higher education  
73 pursuant to § 23-9.2:10 relating to the assessment or intervention with a specific individual. However, in  
74 the event an individual who has been under assessment commits an act, or is prosecuted for the  
75 commission of an act that has caused the death of, or caused serious bodily injury, including any felony  
76 sexual assault, to another person, the records of such threat assessment team concerning the individual  
77 under assessment shall be made available as provided by this chapter, with the exception of any criminal  
78 history records obtained pursuant to § 19.2-389 or 19.2-389.1, health records obtained pursuant to §

**79** 32.1-127.1:03, or scholastic records as defined in § 22.1-289. The public body providing such records  
**80** shall remove information identifying any person who provided information to the threat assessment  
**81** team under a promise of confidentiality.

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