

# CLEMSON UNIVERSITY

## FOUNDATION



### Policy - Information Technology

<b>Procedure Title:</b>	Solicitation and Confidentiality Codes Policy		
<b>Policy #:</b>	6.07	<b>Effective Date:</b>	April, 2021
<b>Responsible Department:</b>	CUF IT	<b>Cross Reference:</b>	6.07P
<b>Approved by:</b>	CUF Senior Staff	<b>Policy Owner:</b>	Chief Technology Officer

#### Purpose

The purpose of this policy is to describe the solicitation codes and confidentiality codes included on constituent records in Cadence and to describe the process by which codes are added and the ways that they must be adhered. This policy and accompanying procedure are part of the CUF IT policies to manage the fundraising database and applies to all users of the database as contemplated within the One Clemson Data Collaboration Agreement. Nothing within this statement shall preclude any other policy or procedure from applying to all entities and individuals that are users of the fundraising database.

#### Definitions

1. Cadence – the fundraising database.
2. Clemson Enterprise – includes but is not limited to Clemson University and affiliated entities, including the Clemson University Foundation (CUF), IPTAY, the Clemson Alumni Association, and the Clemson Architectural Foundation.
3. Confidentiality Codes – codes affixed to a constituent or to a specific gift indicating the level of anonymity the constituent desires.
4. Solicitation Codes – codes affixed to a constituent record that indicate the type of communication allowed or requested by a constituent.
5. Participants – the entities that participate in the data collaboration agreement and share data within Cadence.
6. Users – the individual employees of the Participants that utilize the fundraising database.

#### Policy

Donors have control over their solicitation and confidentiality setting. If a donor indicates that they prefer one form of communication over another or if they indicate that they want their gift or record marked confidential then their direction must be followed by all users and participants of Cadence.

Certain privacy laws across the United States and internationally impose penalties for violating certain directions that a donor may impose upon the holder of their data. For this reason and out of respect for all of the Clemson Enterprise constituents the codes included within this must be followed.

Exceptions to this policy may be approved by either the Clemson University Vice President of Development & Alumni Relations, Executive Director of Advancement Services of CUF or by the Legal Counsel of CUF. Such exceptions should be documented in the donor's record. If this policy or accompanying procedure is violated it may result in the suspension of access to the database. The accompanying procedure details the solicit codes and confidentiality codes that are to be followed. The Procedure may be updated as needed but any updates must be submitted for review to the Executive Council of the Data Governance Council and approved by the CUF Senior Staff.

#### Approval:

This policy was submitted to the Data Governance Leadership March 2021 and each entity stakeholder approved as written. This policy was submitted to the CUF Senior Staff April, 2021 and approved.