



VCU

Policy on use of university data and outside applications

Policy Type: Local

Responsible Office: Office of Development and Alumni Relations

Initial Policy Approved: 05/2009

Current Revision Approved: 12/2012

Policy Statement and Purpose

The Office of Development and Alumni Relation's division of Advancement Services must be involved in the procurement of services provided by any outside vendor or consultant if sharing of confidential data is required. Advancement Services assists in the evaluation of the vendor or consultant and the method and security of the data exchange.

Security of donor information is the highest priority.

Data cannot be transmitted electronically to email accounts outside the vcu.edu domain without specific permission from the AVP for Advancement Operations. See the Policy on Data Access and Privacy. Data transfer must occur over a secure transfer method, such as SFTP.

Vendors, consultants and other external entities must understand and agree to comply with the Policy on Data Access and Privacy before receiving access to institutional data. Contracts with vendors must reflect and adhere to applicable Development and Alumni Relations and all other applicable VCU policies.

Data must not be exchanged with an outside vendor without approval of the AVP of Advancement Operations.

Advancement Services is not required to support third-party fundraising, donor or alumni applications if there has been no agreed upon coordination, planning and allocation of appropriate resources between Advancement Services and the university division or unit acquiring the application.

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Who Should Know this Policy?

All university employees engaged in activities related to development and alumni relations are responsible for knowing this policy and familiarizing themselves with its contents and provisions.

Definitions

DAR employee

Someone who is employed by Virginia Commonwealth University and reports directly or indirectly to the vice president of Development and Alumni Relations.

VCU employee

Someone who is employed by Virginia Commonwealth University.

Volunteer

Someone who is not employed by Virginia Commonwealth University but works in an official capacity with the university and acts on its behalf.

Confidential information

This information is described by, but not limited to, the following general classes:

- Name, address, email address, telephone number or other contact information or social security number.
- Information about alumni, members, prospects, donors or other constituents gathered to aid in determining appropriateness of solicitation and level of membership or gift request; and specific data in prospect lists that would identify prospects to be solicited, dollar amounts to be requested, and name of solicitor.
- Portions of solicitation letters and proposals that identify the prospect being solicited and the dollar amount requested. Letters, pledge cards, copies of checks or other responses received from members or donors regarding memberships or prospective gifts in response to solicitations.
- Portions of receipts, thank you letters or other membership or gift acknowledgment communications that would identify the name of the member or donor and the specific amount of the gift, pledge or pledge payment.
- Donors' or prospects' financial or estate planning information or portions of memoranda, letters, interview notes or other documents about any donor's or prospect's financial circumstances.
- Data detailing dates of memberships, gifts, event registrations, payment schedule of gifts, form of gifts or specific gift amounts made by donors.

Advancement Services

Advancement Services is managed by the associate vice president for Advancement Operations and oversees the following service functions for the Office of Development and Alumni Relations and the university: Information Technology and Online Services, Gifts & Records Management, Prospect Research and Campaign Data Analysis, and DAR Finance and Administration.

Advancement Services manages application development and data integrity in Millennium and other systems; provides application training to users; and ensures security for information in the DAR databases, in accordance with university IT policy. It is also responsible for gift processing; managing the development and production of reports, including fundraising analysis; data files for solicitations or project and alumni statistics; technical management of the division's Web space for both internal and external users; and management of the department's budgeting, expenditures and human resource functions.

Advancement Services' records

Advancement Services' records include all written papers, letters, documents, photographs, tapes, microfiche, microfilm, photocopies, sound recordings, maps and other documentary materials or information in any medium regardless of physical form or characteristics, including data processing devices and computers, relating to development and alumni relations.

Advancement Services' systems

All systems managed by Advancement Services, including, but not limited to, Millennium, Development and Alumni Relations intranet and Internet sites, online reporting center, online giving and payments, online event registrations and event registrations, e-communications and the alumni website and alumni portal.

Advancement Services' sensitive systems

All systems managed by Advancement Services that contain any confidential information. These include, but are not limited to, Millennium, the online reporting center and event registration system.

Vendor

Any company or individual with a contract with VCU or its affiliated foundations for services or other reason.

Consultant

Any person or company with a contract to provide a service or perform a task on behalf of VCU.

Related Documents

- Policy on data access and privacy
- Policy on Advancement Services' request for services

Contacts

The Office of Development and Alumni Relations officially interprets this policy. The Office of Development and Alumni Relations is responsible for obtaining approval for any revisions as required by the policy Creating and Maintaining Policies and Procedures through the appropriate governance structures. Please direct policy questions to the Advancement Services IT Manager or the AVP of Advancement Operations.

Procedures

1. When submitting requests for data through the Advancement Services Help Desk, indicate which vendor, if any, is receiving the requested data.
2. Check the DAR staff intranet for a list of approved vendors. If the vendor you would like to work with is not on the list, then you must submit a request to have that vendor approved before data can be shared.

Forms

See the Advancement Services Online Request forms at <http://staff.oda.vcu.edu/HelpDesk>.

Revision History

This policy supersedes the following BOV policy approved in May 2009:

- 9.1.3 Use of University Data and Outside Applications Policy

FAQs

This policy has no FAQs.