CRM Data Usage & Governance Policy

Definitions

Advancement Services: Manages, analyzes, and leverages data used to inform organizational strategy and conduct operations that engage and steward FLC's stakeholders, supporters, and members. They provide the tools, strategy, and data for the team to succeed. This consists of gift & data processing and entry, financial management & receipting, and reporting & metrics. This team manages the donor database. At FLC they also manage the alumni database.

Data Extraction: The process of providing usable data in reports or donor contact lists.

FLC Constituents: The records within a database. May be graduates, former students, friends, donors, and potential funders of FLC.

Shadow Databases: Information collected, maintained, and utilized by departments, offices, or individuals outside of the constituent database. Typically, these types of "databases" are spreadsheets or email lists. This database is B
Raiser's Edge NXT. Occasionally this information may be used for institutional research purp
firmly committed to protecting the privacy of its constituents. Information in the advancem
database should be utilized solely to further the fundraising and alumni relations mission o
and only accessed by those employees who have a need to conduct school business or volu
working in an official capacity to further fundraising and alumni relations objectives.

Access to the Raiser's Edge database is limited to people with FLC business interests whose
require it and is granularly defined based on job role. Information contained within the dat
made available to volunteers, faculty members, administrators, and vendors, working in an
capacity to further FLC's and FLC Foundation's fundraising mission, and FLC's alumni relatic
Information will only be furnished after a confidentiality agreement is signed and received
Advancement Office.

Information requests for entities outside the Advancement Office may be submitted to the
Advancement Office. The Vice President of Institutional Advancement makes the final dete
about whether an organization or person has a legitimate affiliation with FLC, the Manager
Advancement Services makes the final determination concerning the data that may be sha
organization or person.

The campus community is responsible for sharing alumni, donors', and friends' contact information with the Advancement Office. The Advancement Office will input and maintain data, provide reports, process donations, and provide donors with receipts and stewardship.

Inputting Data into CRM:
Campus partners and Advancement staff can request Advancement Services import data to update existing or create new constituent records. They must also submit data updates to maintain data integrity.

- Submit lists used to track campus partner data to Advancement Services to input new or update existing constituent records

Removal of data from the CRM database:
Data is reviewed and culled periodically depending on its relevance and current industry best practice.

- DEI data may be removed at any time if constituent safety is in jeopardy due to changing political trends, to prevent a person's identity if the data may cause them harm, if the person no longer identifies with that specific data, or if the language or best practice for keeping the DEI data has changed.
- Data that is deleted from the database must also be deleted from outstanding reports and workflows. This includes data labels as well as constituent data. New reports may be created, if necessary or appropriate, that replaces or removes deleted fields.
- Donors may have their data deleted on request. It must be known to the donor that if their data is deleted, and they participate or interact with FL: