



## PROSPECT MANAGEMENT POLICY

### PURPOSE

The Montana State University (MSU) Foundation Prospect Management System (hereafter PM System) and related ASCEND/SUMMIT development database (hereafter database) information is regarded as the collection of information for philanthropic and development purposes relating to Montana State University (MSU) alumni, contributors, friends, corporations, foundations and special groups. Confidential information pertaining to donors or prospective donors is to be scrupulously protected so that the relationship of trust, integrity of the institution, and right to privacy of alumni, friends, special groups and donors are maintained. Access to the PM System and related development information will be strictly limited to professionals whose primary duty is to further the legitimate philanthropic mission of MSU and the MSU Foundation. For the purposes of this policy, the PM System of the MSU Foundation database includes any information concerning an entity which is maintained by the MSU Foundation staff or its services for the purpose of identifying, cultivating, soliciting, stewardship or tracking of alumni, donors, friends, corporations and special groups for philanthropic purposes.

### POLICY

- Database passwords will be assigned to individuals and will not be shared with others.
- The MSU Foundation will be notified of changes in personnel who have access to the database, including work-study and part-time individuals. All personnel allowed access to the database will be required to attend training sessions and must have their own assigned username and password.
- In the interests of accuracy and efficiency for the purposes of development, colleges and departments will use the MSU Foundation database, master records and hard file copies rather than maintaining separate records of development efforts regarding alumni, corporations, foundation, donors and friends.
- Individuals not within the central operations of the MSU Foundation will not be provided the ability to change or up-date certain informational fields.
- A reasonable charge may be made for special coding and/or research of select groups, data processing, machine copying services and supplies/references associated with providing requested information.
- The MSU Foundation Office of Research & Prospect Management reserves the right to review and repeal information services and privileges in order to resolve confidentially policy infractions.

**Disclosure of Information:**

- **Breach of password security or other compromises in the security of the PM System and related areas of the ASCEND/SUMMIT database will result in immediate loss of access to these areas.**
- Information will only be disseminated to authorized academic and administrative offices of the University, the MSU Alumni Association and MSU ancillary units for uses consistent with their duties and responsibilities as they relate to development. Development information will not be provided to volunteers or other individuals who are not MSU or MSU Foundation employees.
- Information, data or printed materials provided by the database is for use only for the purpose requested and will be shredded or otherwise properly discarded once (or) after its specified purpose is concluded.
- Information is not to be used to construct honor rolls, solicitation lists, or other mailing lists, or to engage in other fund raising activities without the expressed approval and participation of the MSU Foundation.
- Information, data or printed data materials provided by the database will not be used to create or maintain ancillary electronic records, files or databases of any kind.
- The following is legally considered public information. However, such information should not be used, released, or reproduced in any combination for mailings (or in printed formats such as honor rolls, lists, or labels) except with appropriate MSU Foundation approval: name, addresses, and telephone numbers, year(s) of attendance at MSU, major field(s) of study at the University, degree(s) and date(s) of degree(s) awarded by the University, and college(s) enrolled at the University.
- During employment and after separation of employment from the MSU Foundation: Information, lists, reports, research or other materials which are used, gathered or disseminated for development, advancement or fund raising purposes for MSU and its ancillary units are not to be used, transferred, copied or otherwise disseminated to any organization, group or entity for any reason.