Article I. Purpose

To record and maintain the contact and biographical information on all persons associated with Clemson University boards and councils and other individuals of particular significance to Clemson (formerly known as VIP groups) in one location (The Raiser’s Edge Alumni/Development/Constituent database maintained by the Division of Advancement) so that communications and special events may be coordinated with the most current, complete, and accurate data possible.

Article II. Introduction

Organizational Records are a subset of the University’s Raiser’s Edge Alumni/Development database and exists to provide timely and effective communications about the University to S.C. leaders, Clemson’s top volunteer leadership, Clemson’s major giving societies and clubs, collaborative partners, select news media, and other educational institutions and affiliates. This policy deals only with this Organizational Record Data subset.

Organizational Record Data is acquired from University employees who maintain the data in performance of official administrative job duties. The Organizational Group Coordinator is responsible for coordinating with those University employees to manage, compile, and maintain the mailing lists and for distributing lists and other information related to communications and event mailings.

Article III: Policies and Guidelines

A. Ownership

The Raiser’s Edge Alumni/Development database, managed by the Director of Information Technology in Advancement Services (Larissa Kelly), is the official database for Alumni/Development and is also available to assist the University community in transacting university-related business. The Organizational Records Data is a subset of the Clemson University Raiser’s Edge Alumni/Development database.

B. Management

Organizational Record Data is managed by the Organizational Group Coordinator (Kathy Jenkins), but is the sole property of Clemson University. It is vital that Organizational Record Data be collected and managed properly for effective communication with internal and/or external constituents and to minimize duplication and coordinate and integrate messages.

C. Roles/Responsibilities

- Organizational Group Coordinator (Kathy Jenkins): The Organizational Group Coordinator is responsible for coordinating with Organization Contacts. The
Organizational Group Coordinator will supply Organization Contacts with a quarterly report of Organization members and their respective contact information. The Organizational Group Coordinator will perform data entry tasks in The Raiser’s Edge to record Organization membership. The Organizational Group Coordinator will approve requests for the creation of new Organization Records and mailing lists and event invitations.

- **Organization Contacts** (College/Department Contacts): The Organization Contact will be responsible for the timely communication of Organization changes with the Organizational Group Coordinator. The Organization Contact should submit updates using the guidelines from Article V. (Guidelines for Supplying Updates to Organizational Group Coordinator).

- **Donor Services, Public Affairs and Publications**: Donor Services, Public Affairs, and Publications will be responsible for managing major events involving a specific set of organizational records. All persons responsible for managing major events will consult with the Organizational Group Coordinator before planning events that include certain organizations.

- **Advancement IT** (Larissa Kelly): The Advancement IT group will be responsible for providing the capability to track the required Organizational Data in The Raiser’s Edge, to include the Organization Contact names for each Organization. The Advancement IT group will provide Raiser’s Edge technical support for the Organizational Group Coordinator and the Donor Services team. The Advancement IT team will support the creation of new Organizations or new Organization Members contact information in The Raiser’s Edge.

### Article IV. Usage of Data

The Organizational Record Data is available to any University department. Data is used to provide key messages about Clemson University to top-level constituents. Requestors should contact the Organizational Group Coordinator for prior approval and to request list information use the Alumni Information Request Form: [http://cualumni.clemson.edu/alumnirequestform](http://cualumni.clemson.edu/alumnirequestform) (See Article VI. Guidelines for requesting a mailing)

To protect the privacy of the individuals on the lists and the integrity of the data, the Organizational Group Coordinator will review all requests for necessary approvals and prior to mailing information being extracted.

The Raiser’s Edge Alumni/Development database provides assistance for programs, communications and events that bring together alumni, donors and friends of Clemson University. Our goal is to provide the best possible service consistent with our obligation to be good stewards of the database information entrusted to us. Good stewardship implies that we must be judicious in sharing the database information. We must maintain its confidentiality and, to the best of our ability, ensure its accuracy and its appropriateness for each specified use.
Article V. Guidelines for Supplying Updates to Organizational Group Coordinator

Requirements for initial review and sign-off – All requests to create Organizational Records and/or to provide changes to the group must be reviewed and approved by the Organizational Group Coordinator prior to the change being made. All requests must be submitted in writing. Organizational Group Coordinator will coordinate with Organization Contacts to ensure the change is valid and to make sure the information is accurate. The Organizational Group Coordinator and the Advancement IT Manager can make changes to the data.

Requirements for updates at FYE or whenever terms expire - One week prior to fiscal year end, the Organizational Group Coordinator will send a memo via email to all Organization Contacts requesting updated data for new board members. All new lists should be received by July 1 of the new fiscal year and no later than mid-July.

Requirements for Quarterly Report updates – Organizational Group Coordinator will supply Organization Contacts with a Quarterly Report of Organization’s members and their respective contacts. Organization Contacts will review the list, highlight any changes to the list, and send them back to the Organizational Group Coordinator within three to five days from receipt.

Requirements for ad hoc updates – Organization Contacts should submit ad hoc changes to the Organizational Group Coordinator immediately upon receipt of notification. The updates should be sent via written correspondence, by email to: vip_network-l@clemson.edu or by Interoffice mail addressed to Organizational Group Coordinator, 114 Daniel Dr.

The following basic data elements are to be provided by Organization Contacts. Required data elements are indicated by *, other data elements are desired if available. Both home address and business addresses are desired, though at least one is required.

1. Title
2. Legal First Name*
3. Middle Name
4. Last Name*
5. Suffix*
6. Nickname if applicable
7. Business Address* required if no Home Address available
8. Home Address* required if no Business Address available
9. Phone
10. Email
11. Preferred single formal salutation*
12. Preferred joint formal salutation, if applicable
13. Preferred single informal salutation
14. Preferred joint informal salutation, if applicable
15. Gender*
16. Spouse name (Title, First, Middle, Last, Suffix) required if marital status = Married*
17. Marital status

Updates should be sent in MS Excel spreadsheet format to: vip_network-l@clemson.edu.

For questions or more information call 864-656-1079.

**Article VI. Guidelines for requesting a mailing**

To submit requests for mailing information, complete the Alumni Information Request:
http://cualumni.clemson.edu/alumnirequestform

Approved requests will be completed within five to ten working days from the date of the initial request. A sample of the mailing materials is required (pdf.’s are fine) during the approval process.

Sensitive lists require additional approvals. Approvals may be obtained by the requestor. The Organizational Group Coordinator will inform the requestor of the steps to be followed if additional approvals are required.

**Article VI. Frequently Asked Questions (FAQs)**

1. What if I want to mail to several Organizations? Using the website for requesting a list, the requestor may ask for a mailing list comprised of several Organizations. See Article VI. Guidelines for requesting a mailing.

2. Can I keep a list that I receive for one mailing for a subsequent mailing? No, because it may be out of date by then. Lists are to be used for single mailings only.

**Article VII. Revisions**