



ALMA COLLEGE

Memorandum of Understanding Confidentiality of Records and Information

The Advancement Office acknowledges the need for our partners to have reasonable access to the contact information of alumni, parents, and friends. To support these efforts, we aim to provide the information needed to those who are assisting with efforts that directly benefit our alumni and/or Alma College.

In accordance with Council for Advancement and Support of Education (CASE) standards, we will:

- Safeguard and respect donor and prospective donor information;
- Honor the wishes of an individual and/or organizational constituent with regard to how directory information and/or giving history is used;
- Record and keep only information relevant to cultivation, solicitation, and stewardship;
- Identify the source of retained information;
- Safeguard prospective donor, donor, and other constituent lists compiled by the institution as the property of the institution; these lists may not be distributed or used for unauthorized purposes or for personal gain;
- Make every effort to ensure that volunteers, vendors, and external entities with access to constituent information understand and agree to comply with the organization's confidentiality and public disclosure policies.

In gaining access to information from the Advancement Office individuals agree to the following:

- Information can be utilized for a variety of reasons: sharing information and news, providing updates on activities and programs, extending invitations to events, etc. However, requested information cannot be used to solicit donations or for personal gain.
- The information may not be divulged, disseminated, or sold.
- Any email communication must be sent individually or by Blind Carbon Copy to protect privacy.
- Disclosure of this information to unauthorized parties could violate the Family Educational Rights & Privacy Act (FERPA). The information must not be shared with any outside parties unless deemed appropriate by Alma College.
- All information received must only be used for the sole purpose stated in the information request and then destroyed in a secure manner. Data should never be used for communication that is not approved by the college.
- All provided data has a 30-day expiration. If more than 30 days have passed since the data was provided, the requester should destroy the provided data in a secure manner and request new information.
- Any and all updates to contact information must be shared with the Advancement Office at 989-463-7081 or advancement@alma.edu.

- Individuals should not share address, phone, or other information from any campus wide database to non-College persons, unless appropriate College administrators determine that disclosure is required by law.

Employees and constituents who violate any part of the above agreement are subject to disciplinary action at the discretion of their supervisor and/or the Office of the President.

I acknowledge that I have read and understand the above Memorandum of Understanding and that unauthorized use of confidential information may lead to disciplinary action.

(Signature)

Date

(Print name)