

Policy Number/Title: 9.3.1 Use and Release of Advancement Data
Effective Since: 09/21/2021
Last Revision Approved: 1/16/2026
Responsible Office: University Advancement

1. Scope:

This section was intentionally left blank.

2. Definitions:

2.1 Advancement Constituents: alumni, donors, prospective donors, other University contacts, and their associated contacts.

3. Policy:

3.1. GENERAL PROVISIONS

Winthrop University owns institutional data, and each authorized user of this data is responsible and held accountable for its appropriate and authorized use. Use of donor data for purposes other than for University Advancement, especially for commercial, personal, or political purposes, including the sale of data, is strictly prohibited. Information maintained in hard copy or electronic files as part of an official university record shall be viewed only by authorized Winthrop University employees and representatives (including selected volunteers) who need such information for legitimate institutional advancement related business. Only the minimally needed confidential information should be provided by Advancement to non-Advancement staff and volunteers.

3.2 ADVANCEMENT CONSTITUENT INFORMATION

Advancement Constituent Information is defined in the University Advancement Privacy Statement as follows: name, contact information, social media contacts, biographical information, family information, affiliation activities or interests, including event and volunteer participation, occupation information, and giving history and giving capacity.

3.3 ADVANCEMENT CONSTITUENT INFORMATION ACCESS



3.3.1 Only University employees who have a need to know in order to perform an authorized University function or activity may request access and use of Advancement Constituent Information. Advancement Constituent Information will be used for engagement, cultivation, and solicitation purposes in accordance with applicable policies. Access may include system access to the Advancement CRM, data requests and reporting or both.

3.3.2 Release Under Other Circumstances

3.3.2.1 Internal: Deans, Directors, Senior Administrators, Faculty or Staff directly involved in an authorized function involving Advancement related business.

3.3.2.2 Affiliated entities: Winthrop University Alumni Association, Winthrop University Foundation, Winthrop University Real Estate Foundation.

3.3.2.3 External:

- Government Agencies, Law Enforcement, or Court Order: Should be directed to the Office of the General Counsel.
- Other: Advancement may release donor information under certain circumstances to other external parties when the constituent has given express consent to the release.

3.4. MISUSE OF RESTRICTED INFORMATION

Failure to abide by the policies outlined within this document may result in disciplinary action with Human Resources for employees or the Dean of Students for students. For outside parties, University Advancement may deny future requests for or access to constituent information and other related privileges including the creation and distribution of email campaigns.

4. Procedures:

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5. Resources:

[University Advancement Privacy Statement](#)



[Data Request Form](#)

[Solicitation Request Form](#)

[Outreach Request Form](#)

[Alumni Update Form](#)

6. History of Revisions:

01/16/2026	Minor Revisions
09/21/2021	Minor Revisions
05/01/2005	Policy first established

7. Approvals:

Responsible Officer Signature/Date:

Vice President/Senior Administrator Signature/Date:

President Signature/Date: