

## IX. Contact Relationship (CR) Database Use Policy

1. We use a Customer Relationship Management (CRM) system; The Data may **only** be used as follows:

a) All use of the CRM whether for email, mailings, or phone banking shall be immediately logged with the party Secretary. This log is to include date sent, the individual or party authorized to send, the receiving parties, and the information being sent.

b) Distribution of the Libertarian Penn Newsletter, and any LPPA project mailing authorized by the Board of Directors.

c) Any recognized county or regional committee may use the data within their respective electoral districts to pursue **approved Libertarian** candidate activities or other political party activities.

- An approved candidate shall be an individual who has the nomination or formal endorsement of any county/regional chapter. (If a candidate is in an area where there is no county/regional chapter, the endorsement/nomination will come from the LPPA.)

d) Any nominated candidate may use the data within their respective electoral districts upon signing the LPPA/Candidate Data Agreement. *\*It is suggested that Information Services and Elections Committee creates this agreement together.*

e) Any candidate running for inner party positions shall be able to commission the Membership Committee to send mailings using the state party bulk mailing permit.

- Mailings may only be sent to the entire membership or the current list of registered delegates.

- Mailings must include a "paid for by" label.

- Each year, Membership Committee must inform the entire membership of the latest date to submit mailings within a fair amount of time before Convention.

f) Any standing or working committee volunteer may use the data within their assigned systems role, as required.

~~g) In addition, anyone pursuing a position in the state party, or seeking the nomination/endorsement of county, regional, or the LPPA, may be approved by a county or regional committee, or, if it is a statewide request, or a request for an area where there is no active county or regional committee, the LPPA Board of Directors will be responsible for approving or denying such requests.~~ *\*Addressed within new additions.*

### 2. Limitations on Use

a) Authorized county or regional committee personnel may use LPPA member data and its own affiliate data, in perpetuity.

b) Endorsed candidates can use CR Data for the duration of their campaign **within their electoral districts.**

c) LPPA Member records will be provided consistent with restrictions specified in the Member Privacy Policy.

~~d) All working and standing committee volunteers can use the data for the duration of their assigned role.~~ \*Redundant – Referenced in section IX, 1, f

d.) Anyone to be granted access to the CR database must sign an NDA (Non-Disclosure Agreement) before access is given.

### 3. Request procedure

~~a) Requests for CR data shall be directed to the County or Regional Affiliates if it is specific to a county or regional chapter. Requests made directly to the LPPA may be made to the Membership Chair, or any other member of the Executive Committee.~~ \*Addressed in section a) below to better reflect current procedure.

~~b) Requests shall include the Request/NDA form. If a completed form does not accompany an email request, whomever receives the request will send the form to the requestor, and if this form is not returned, the request will not be considered.~~ \*Redundant – NDA mentioned in IX, 2, d

a) The keeper of the CR data (Information Services Committee) is charged with distributing data in accordance with this policy; the Secretary of the LPPA shall keep records of all requests for member data for a period of three years, and shall periodically report to the Board of Directors on such requests.

b) All requests for data shall be acted upon as soon as practical. If the requestor has not received a response within 1 calendar week, he/she should contact the Chair directly. ~~(unless any vice chairs wish to be contacted.)~~ \*In the interest of efficiency.