

SMUD BOARD POLICY

Category: Strategic Direction	Title: Information Management and Security Policy
Date of Adoption: August 7, 2008	Policy Number: SD-16
Revised: October 16, 2008	Resolution No. 08-08-03
	Resolution No. 08-10-09

Proper management of District information is a core value of the District. Consistent information management practices are critical to reduce the risk of legal liability, regulatory noncompliance, natural disaster recovery, criminal activity, theft of critical resources, and to assure customer satisfaction. The District shall take reasonable measures to ensure:

- a) **Information Security:** The protection of District information (confidential, proprietary, and intellectual property) and information systems from unauthorized access, use, disclosure, disruption, modification, or destruction.
- b) **Customer Privacy:** Maintaining the confidential nature of customer information that is proprietary or relates to customer privacy interests, including social security numbers, addresses, phone numbers, birth dates, and specific billing, credit and energy usage information; provided, however, customer privacy shall not extend to aggregate information regarding the usage, load shape or other general characteristics of a group or rate classification. Release of customer information is permissible as reasonably necessary to meet the District's business interests (e.g., collection of unpaid bills or debts, reporting to credit agencies, exchange of customer information with other utilities for collection purposes or determinations of creditworthiness, or cooperation with law enforcement).
- c) **Records Management:** The efficient and systematic control of the creation, capture, identification, receipt, maintenance, use, disposition, and destruction of District records, in accordance with legal requirements and Board policies.

Monitoring Method: GM Report
Frequency: Annual