



POLICY CONCERNING THE MANAGEMENT, ACCESS, AND USE OF INSTITUTIONAL ADVANCEMENT DATA

Effective Date: June 27, 2008

Originating Office: Office of Vice-President,
Advancement and
Alumni Relations

Supersedes /Amends Policy dated: n/a

Policy Number: VPAAR-2

SCOPE

This policy governs the management, access and use of institutional advancement data residing in the Advancement Information System (AIS). It also acknowledges the central advancement database as the only repository where institutional advancement data is to be collected and stored.

This policy encompasses all fundraising activities conducted by the University or by any entity authorized by the University.

PURPOSE

To provide a common basis of understanding of institutional advancement data as a business-critical University resource, and of the responsibilities accompanying use of institutional advancement data and its management to all members of the University community.

DEFINITION

Institutional advancement data (IAD) is defined as that data which is created, collected and stored in or transferred onto the AIS, by the Office of University Advancement and Alumni Relations, and related faculty-based offices, in support of its business and administrative functions. Such data may relate to donors, alumni, students, faculty, employees, event attendees, friends of the University, prospects, board and senate members, and other members of the University community such as students, staff, faculty and retired personnel, and may include personal, academic, financial, and other information.

POLICY

1. The central AIS is the only official University database where institutional advancement data should reside. Maintaining redundant and duplicate data in multiple systems or the creation and use of parallel databases in connection with fundraising and alumni relations activities is prohibited.

2. Access to the AIS is to be granted by the Vice-President, Advancement and Alumni Relations to other Senior Officers of the University when deemed necessary. Otherwise, access to the AIS is strictly limited to those University employees directly involved and responsible for fundraising and alumni relations functions, as well the associated administrative functions such as gift processing, prospect research, financial reporting, events management, auditing, gift accounting and campaign reporting, and only for the purpose for which use has been authorized. Authorization for access to data is not transferable.
3. Access to the AIS by University-associated personnel shall be granted at the discretion of the Vice-President, Advancement and Alumni Relations or her delegate, through the Office of Advancement & Alumni Relations when a legitimate business need for the data is demonstrated, and to external third parties only when release of such data would not violate the university's stewardship obligations, privacy legislation, or legal contracts. Institutional advancement data has legitimate uses for fundraising and alumni relations purposes.
4. Individuals granted access must sign the AIS Database User Agreement, which outlines users' roles and responsibilities and rules on appropriate use of information and confidentiality.
5. Data in the AIS is only to be shared with external third parties for purposes such as the building of affinity programs and its use will be limited to Concordia related programming after approval by the Office of Advancement and Alumni Relations.
6. The responsibility for ensuring the confidentiality of data stored in the AIS rests with the Vice-President, Advancement and Alumni Relations.

Adopted by the Board of Governors on June 27, 2008