



Policy 3.1

AWA Access to non-DAR Staff Policy

Responsible Official: VP for Development & University Relations

Administering Division/Department: ACE (Donor Records System)

Effective Date: July 01, 2005

Last Revision: July 11, 2018

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Overview

To centralize records and manage communication with Emory's different constituencies, which include alumni, parents of alumni, faculty, staff, friends, corporations, foundations and other vested constituents of Emory.

Applicability

This policy applies to any division or unit, external to Development and Alumni Relations that requests or is offered access, training, and support of the donor database ("AWA").

Policy Details

It is the policy of the Office of Development and Alumni Relations (DAR) to provide access, training, and support to other divisions of Emory when it is mutually beneficial and best serves Emory in the management of constituent records in the development database (AWA). Anyone accessing AWA external to DAR must be staff or faculty, and abide by the same confidentiality protection guidelines which govern DAR staff. Users will be subject to periodic audits to determine an ongoing "need to know" regarding AWA entities.

Any office or division requesting or being offered access to AWA should meet one of the following initiatives for centralizing constituent records in addition to managing communication. They include, but are not limited to:

1. Merging ancillary database (shadow database) records into AWA for the purpose of expanding Emory's constituency
2. Improving record quality so that records are easily updated in a centralized database
3. Managing communication that might impact fundraising efforts or adversely affect perception regarding

Emory's communication with constituents

4. Cultivating and engaging donors and potential donors
5. Providing fiduciary support and stewardship of donors and their gifts
6. Assisting with fundraising efforts
7. Assisting with admission efforts
8. Assisting with career services

A representative from the external office should send a request to DAR-Help for consideration.

If the external office meets any of the criteria listed above, and the Office of Information Systems and Technology (IS&T) can accommodate supporting the office, then the ED of Development & Alumni Information Services should be notified about the request. If IS&T cannot immediately support the request from the external office, then consideration should be given to a timeframe when access and support can be extended. Any delay in extending access should be communicated by IS&T to the external office along with a timeframe in which access can be arranged.

Once the ED of Development & Alumni Information Services approves the request, IS&T will contact the external office, make the necessary access, training, and support arrangements.

Definitions

AWA: Constituent records database

Related Links

- Current Version of This Policy: <http://policies.emory.edu/3.1>
- [DAR AWA Website](https://AWA.emory.edu) (https://AWA.emory.edu)
- [For Additional Information](http://dar-help@listserv.cc.emory.edu) (http://dar-help@listserv.cc.emory.edu)

Contact Information

Subject	Contact	Phone	Email
Clarification of Policy	Josh Greenbaum	404.712.2020	josh.greenbaum@emory.edu

Revision History

- Version Published on: Mar 29, 2007
- Version Published on: Mar 29, 2007 (*Original Publication*)

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