



## Policy 3.1

### External Office and Unit ACE Access and Support

**Responsible Official:** VP for Development & University Relations

**Administering Division/Department:** ACE (Donor Records System)

**Effective Date:** July 01, 2005

**Last Revision:** March 29, 2007

#### Policy Sections:

- I. Overview
- II. Applicability
- III. Policy Details
- IV. Definitions
- V. Related Links
- VI. Attachments
- VII. Contact Information
- VIII. Revision History

#### 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 ("ACE").

#### 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 (ACE). Anyone accessing ACE 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 ACE entities.

Any office or division requesting or being offered access to ACE 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 ACE 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 DUR-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 Vice President of Operations 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 Vice President for Operations approves the request, IS&T will contact the external office and make the necessary access, training and support arrangements.

## Definitions

**ACE:** Constituent records database, Advancement Community at Emory

## Related Links

- Current Version of This Policy: <http://policies.emory.edu/3.1>
- [DAR ACE Website](https://www.ace.emory.edu/policy.htm) (https://www.ace.emory.edu/policy.htm)
- [Confidentiality and Access Statement](https://www.ace.emory.edu/forms/CA.doc) (https://www.ace.emory.edu/forms/CA.doc)

## Forms and Attachments

Confidentiality and Access Statement : [download](#)

## Contact Information

Subject	Contact	Phone	Email
Clarification of Policy	Benjamin Tompkins	7.8073	benjamin.tompkins@emory.edu

## Revision History

**No previous versions of this policy were found.**

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