

## Directory of Records – General October 20, 2015

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### Office - Development and External Relations, Office of Advancement

#### **Description of the Mandate and Function:**

##### DEVELOPMENT

Through a variety of fundraising initiatives — including donations, sponsorships and grants — the Development and External Relations Department supports Athabasca University's mission to remove barriers that restrict access to, and success in, university-level studies and to increasing equality of educational opportunity for adult learners worldwide. The Alumni and Community Relations function falls within this Department.

Our goals are to:

- increase and diversify the University's sources of funding
- foster lifelong relationships with alumni and friends of the University
- secure the funding needed to support people, programs and infrastructure

We work closely with individuals, families, groups, corporations, foundations and other funding organizations to help sustain AU's excellence in scholarship, learning resources and technology.

The Development Office is a division of the Office of Advancement.

##### ALUMNI AND COMMUNITY RELATIONS

The Office of Alumni and Community Relations is committed to building and fostering the relationship between Athabasca University and its graduates. Through alumni events, volunteerism, communications, and a variety of services and benefits, Alumni and Community Relations encourages lifelong involvement of alumni in University life.

#### **General Classes or Types of Information:**

Information on donors, prospects and alumni is necessary to support the building of relationships that leads to support for Athabasca University and its program, research and scholarship initiatives. Personal information is collected from donors in order to provide tax receipts and to steward their gifts. Personal information on alumni is provided by Banner records and/or from the alum him or herself, and is used to inform them of relevant activities and for fundraising purposes. Information on prospects is also collected from public sources (directories, news stories, etc.).

#### **PIB Titles:**

Raiser's Edge Database

Donor and Prospect Files

**Copies of Records Located:**

- There are 9 members of the Advancement Office, 1 Faculty of Business staff member, 1 ITS staff member, and 1 database consultant (Methodworks Consulting) that have access to Raiser's Edge database, which is a password-protected database, located on a secure server – also password protected – in Vancouver. This is a hosted service provided by Blackbaud, Inc., the software developer. Access is 24/7 via the Web. Different users have access to different subsets of the database; this is determined on a need to know basis by the Manager, Development Services.
- Donor and Prospect files are kept under lock and key in the office of the Manager, Development Services in Calgary.

**Policy & Procedure Manuals, Guidelines, Handbooks, Etc.:**

Copies of a variety of AU policies are kept in many offices within the Department. As well there is an AU Gift Processing Manual, and a Raiser's Edge procedural manual saved in the 'Devservices' computer files and hard copies in a binder in the Manager, Development Services office in Calgary.

**Remarks:**