**On-Line Access Request**

**For Departments, Colleges and University Agencies**

**User Information** Date:

Name:       Email Address:

College/Dept:       UTAD User ID (Example: djones4):

Campus Address:       Phone:

**Please check the functions you will need**

Constituents System (Access to biographical information on Alumni) [ ]

Contributions System (Access to donor information) [ ]

Are you replacing someone who had access? [ ]  Yes [ ]  No

If yes, please indicate who vacated the position so we can terminate their access.

Please indicate the purpose of your request for on-line access

***The University of Toledo Foundation releases information to facilitate university business while maintaining the trust and confidence of alumni and donors. The use of information maintained by the University of Toledo Foundation is restricted to official university business and no information is released for commercial, political or religious purposes.***

 ***Information provided as a result of this request cannot be copied, transferred, assigned, conveyed or disclosed to any other party or to another database system without the consent of the University of Toledo Foundation. Contact Eric Glesser (419-530-5611)***

**Requested: Approved:**

 (Signature) (Department Head)

*By signing this form the requestor agrees to conform to the UT Foundation’s policy for release of information (See Attached).*

*Return this completed form to the UT Foundation, 2801 W Bancroft MS 319 or fax it to 419-530-2895, attn: Eric Glesser.*

**P**OLICY FOR RELEASE, ACCESS AND DISTRIBUTION OF

**ALUMNI AND DONOR INFORMATION**

# Definition of Information

The University of Toledo Foundation Institutional Advancement Database exists for purposes consistent with advancing the mission and vision of the University of Toledo Foundation and the strategic goal of engagement set by the University. It consists of the records of contributors, prospects, and friends of the Foundation and University, as well as alumni and some students of the University. These records include biographical, educational and financial information, which is obtained from individuals themselves or through public records. All data, materials and information of the Foundation pertaining to past, current or prospective donors is proprietary to the Foundation and is hereafter referred to as the Foundation Confidential Information. This document references all forms in which information may be held, including electronic, paper or other formats.

The University and its employees shall consider all Foundation Confidential Information as “confidential records” and agree at all times to maintain the confidentiality of such data and information to the extent permitted by law. If, at any time or for any reason, any Foundation Confidential Information disclosed to the University cannot be legally kept confidential, then such information shall be promptly returned to the Foundation.

All Foundation Confidential Information that may be disclosed to the University or its employees shall be returned by the University to the Foundation upon the sooner of the completion of the University’s use thereof or the Foundation’s request, and upon such return any copies of such information that may have been made by the University shall be either returned or destroyed.

# Release of Information

Attendance and degree information is released to anyone within or outside the University as a matter of public record. The use of all other information about alumni, donors and friends maintained through the Foundation’s Institutional Advancement Database is restricted to purposes consistent with the mission of the Foundation. All requests regarding confidentiality, anonymity or asking not to be listed in publications or directories, will be honored.

**To alumni, donors and the general public**: Information about alumni and donors may be released to non-University or Foundation staff, for the following authorized purposes.

1. The names and addresses of donors (excluding gift amounts) to memorial funds are released to family members of honorees for acknowledgment purposes.
2. Biographical and selected financial data are made available to volunteers, as deemed appropriate by UT Foundation administrators. All volunteers will be asked to sign a form agreeing to maintain the information they receive confidential.

**To university colleges, departments and affiliated organizations**: Alumni and donor lists and other reports will be released to these agencies for the following authorized purposes.

1. Newsletter and informational mailings
2. Statistical or attitudinal surveys
3. Acknowledgment letters offering thanks for gifts
4. Holiday cards
5. Job announcements or placement services
6. Honor rolls that list donor names, but not gift amounts, may be made public in various university publications.
7. Alumni or donor directories are published only after all individuals are notified adequately of the intention to publish the directory and are given the option to opt-out from being listed in it. All requests for exclusion will be honored.
8. Donor recognition displays or publications
9. Statistical reports on solicitations
10. Social or educational events
11. Reunions
12. Receptions
13. Ground-breakings and similar activities
14. Honors and awards

Agencies agree to conform to the Foundation confidentiality policy and not release or use the information released to them for purposes other than the ones originally authorized. The creation and maintenance of unauthorized databases originating from Foundation data is strictly prohibited.

#### Fundraising Requests

All fundraising or gift solicitations of alumni and friends at University of Toledo are carried out through the University of Toledo Foundation. This includes mail appeals, telephone solicitations and personal contacts. Therefore, lists are not provided for this purpose outside the Foundation. Departments and other units desiring solicitation programs should contact the Development Officer for their college, the UT Foundation Information Services office, or the office of the Vice President for Institutional Advancement for consultation. Approved mail and phone fund raising programs will be supervised by the Director of Annual Giving at the University of Toledo. All other solicitation programs are directed by the Vice President for Institutional Advancement.

Use of information maintained by the Foundation’s Institutional Advancement Database in addition to these specific purposes must be approved. These requests must be submitted in writing to the UT Foundation from the appropriate dean, department head or unit supervisor. University agencies must abide by the confidentiality policies that govern information maintained by the Foundation’s Institutional Advancement Database. University agencies may release address information to vendors or businesses outside the University for purposes stated above by signing a vendor confidentiality statement, which restricts the use of the information to the specific purposes approved by the UT Foundation. A copy of a signed vendor confidentiality statement must be attached to the request form.

## On-line Access to Information

On-line access to the Foundation’s Institutional Advancement Database is provided to university colleges, departments and agencies with appropriate approval by the Foundation, through the ONE system. Account records, alumni biographical and deceased files, pledge records and college giving records may be browsed on-line for university business purposes. Access to the information is provided to University agencies to browse biographic or giving information by alum or donor. Browse access to giving information is restricted by department or unit. No access to confidential or anonymous donor information is provided. Total giving information is not available.

Requests for access should be submitted in writing to the Information Services office of the UT Foundation. The Foundation will provide restricted appropriate access and a unique identity for each user. The client must set a password to sign-on to the system. System identities may not be shared. Clients are provided with training when available and are required to sign a confidentiality statement in order to obtain access.

## Lists, Labels and Reports

Requests by colleges, departments and university agencies for selected information in the form of lists, reports or computer disks and files are processed by the UT Foundation’s Information Services Office. Approved fund-raising mailings coordinated by the Foundation’s Annual Giving Office may make use of remittance envelopes and campaign coding to facilitate monitoring results of special campaigns.