

SECTION: Institutional Advancement/Research Office
SUBJECT: Research Office Material Access

ISSUED BY: Office of Institutional Advancement
REPLACES: N/A
APPROVED BY: Office of Institutional Advancement
EFFECTIVE DATE: June 15, 1993

Policy

The Institutional Advancement Research Office information is only to be used by members of the Advancement team. On a limited basis the information may be shared with key volunteers working on certain advancement projects. The Research Office is not to be used as a source of information for personal use. This office is governed by the Code of Ethics of the Association of Professional Researchers for Advancement.

Procedure

APRA Statement of Ethics

As representatives of the profession, American Prospect Research Association (APRA) members shall be respectful of all people and organizations. They shall support and further the individual's fundamental right to privacy. APRA members are committed to the ethical collection and use of information in the pursuit of legitimate institutional goals.

Code of Ethics

In their work, prospect researchers must balance the needs of their institutions/organizations to collect and record information with the prospects' right to privacy. This balance is not always easy to maintain. However, the following ethical principles apply:

- I. Fundamental Principles
 - A. Relevance
Prospect Researchers shall seek and record only information that is relevant to the fund raising effort of the institutions that employ them.
 - B. Honesty
Prospect researchers shall be truthful with regard to their identity, purpose and the identity of their institution during the course of their work.
 - C. Confidentiality
Confidential information pertaining to donors or prospective donors shall be scrupulously protected so that the relationship of trust between donor and donee and the integrity of the prospect research professional is upheld.
 - D. Accuracy

Prospect researchers shall record all data accurately. Such information must be verifiable or attributable to its source.

II. Procedures

A. Collection

1. The collection and use of information shall be done lawfully.
2. Information sought and recorded may include all public records.
3. Written requests for public information shall be made on institutional stationery clearly identifying the sender.
4. Whenever possible, payments for public records shall be made through the institution.
5. When requesting information in person or by telephone, neither individual nor institutional identity shall be concealed.

B. Recording

1. Researchers shall state information in an objective and factual manner.
2. Documents pertaining to donors or prospective donors shall be irreversibly disposed of when no longer need (e.g., by shredding)

C. Use