

Protocol on Requests for Information regarding Alumni, Parents and Friends
University Advancement
September 2009

The Office of University Advancement has primary responsibility for stewardship of the University's relationships with alumni, parents and friends. University Advancement adheres to the philosophy that a strong external relations program fosters multiple rich and meaningful relationships between members of the internal and external University communities. Facilitating these connections with alumni, parents and friends through a centralized office in Advancement enhances the University's success in attracting critical support, in all of its forms, for the University.

Communications must be coordinated with the Office of University Advancement to ensure quality and accuracy, to protect against conflicting fund raising appeals, and to protect the privacy of our constituents. The Office of University Advancement has developed the following protocol for responding to requests for contact information for alumni.

Introduction

The University Advancement division is often asked for contact information so that communications may be sent out to individuals or groups of alumni, parents and friends. These requests come from external, internal and non-St. Lawrence origins. These requests are overseen by the office of the Associate Vice President for Development and Campaign Director to make sure the privacy of our alumni, parents and friends is maintained, to ensure that the role of soliciting donations by the University is centralized and coordinated, so that St. Lawrence is represented well in any communications that go out to groups, to prevent mailing conflicts, and to continue to maintain the accuracy of our mailing lists.

In conjunction with this, we ask on-campus groups and individuals to forward address changes and biographical information through the alumni and parent programs office at 888-758-4438 or app@stlawu.edu, so that we can maintain one database for all University mailing addresses. Often Laurentians think they are giving their change of address to the University when they give it to another University employee, but frequently that information is not passed on to the advancement office. This means our main database does not get updated.

Please review the scenarios below to determine how a particular request will be handled. If your situation is not covered below, or if there are any questions about this protocol, please contact Tom Pynchon, Associate Vice President for Development and Campaign Director, at 315-229-5583 or tpynchon@stlawu.edu.

Internal Requests (from St. Lawrence faculty, staff or student):

1. Faculty/Administration requests for individual alumni contact information or for mailing lists/labels. (*Faculty member/Administrator must give reason/intended*

- use when submitting newsletter/ mailing for review. Requests should be submitted to the alumni and parent program office at app@stlawu.edu.)*
2. Faculty/Administration requests for addresses for fundraising appeals. *(Faculty member/Administrator must submit a fundraising request form online at <https://alumni.stlawu.edu/node/424> outlining the purpose and timing of the appeal. Guiding principles to consider when making a request):*
 - a. *You must receive approval from your division head for the fundraising initiative.*
 - b. *The types of solicitations that will be considered are those that appeal to constituents that don't normally support the University in other ways (e.g., non-donors, sporadic donors).*
 - c. *In those cases where active donors are being approached, the appeal must include language that these gifts are intended to be above and beyond their support of the St. Lawrence Fund.*
 - d. *The appeal must not conflict with any other fundraising mailing the individual(s) may be receiving and must be sent in coordination with other University mailings.*
 3. Faculty/Administration requests to survey alumni. *(Faculty member/Administrator must submit a copy of the survey to the alumni and parent programs office in advance for approval. The alumni office will consult with Christine Zimmerman, Director of Institutional Research and the Dean's office before granting final approval.)*
 4. Student requests for contact information for individuals or groups of alumni. *(Requests should outline reasons and provide letter/newsletter they would like to mail to the alumni and parent program office. In addition, Student Life must support the initiative.)*

External Requests (from alumni, parents and friends):

Often alumni can retrieve the information themselves by going through *my* St. Lawrence, and they should be encouraged to do so. If they need assistance, have them contact the alumni and parent programs office at 888-758-4438 or app@stlawu.edu or Mark Mende, Director of Web Services at alumsupport@stlawu.edu.

5. Requests for individual contact information. *(Refer the inquirer to my St. Lawrence first, or the alumni and parent programs office can verify if they were listed in the last Harris alumni print directory. If they were, information can be released. Alternatively, an advancement staff member will contact the person the requestor is trying to reach to let them know they are being sought out and allow that person to make the contact if they wish.)*
6. Requests for St. Lawrence to email alumni in designated regions for non-slu events. *(Requests should be reviewed by the alumni and parent program office, although typically these requests are not granted.)*

7. Requests to email classes on their behalf (e.g., announce non-SLU events, classmate illness or death, etc.) (*Requests should be reviewed by the alumni and parent program office, although typically these requests are not granted.*)
8. Requests for an advance list of event attendees. (*Event attendees who have given us permission to do so, are listed online at alumni.stlawu.edu*)

Requests from outside the Laurentian community:

9. Contact information for individual alumni. (*The University cannot provide this information directly. Advancement staff member will contact the person that the requestor is trying to reach to let them know they are being sought out and allow that person to make the contact if they wish.*)
10. Contact information for alumni affinities. (e.g., study abroad participants, fraternity/sorority alumni, etc...). (*Cannot provide this information.*)
11. Request for specific information on an alumnus for articles in the paper, to research a family member, etc. (*Media requests should be directed to University Communications at 229-5585. Requests re: research on a family member, etc... should be made through the alumni and parent programs office at 888-758-4438 or app@stlawu.edu and will be handled on a case-by-case basis.*)
12. Request to confirm SLU attendance of a current student or alumnus/a. (*Refer to University Communications at 229-5585.*)

Fundraising Request Form
<https://alumni.stlawu.edu/node/425>

Please note that permission is granted for one time usage. This is due to the fact that alumni, parent and friend data changes daily.

Name: *

Position at St. Lawrence: *

Campus Phone: *

Email Address: *

Please describe the purpose of the solicitation (e.g., what the gifts will support). : *

Please indicate the audience you wish to solicit (e.g., alumni, parents, friends, specific class years or affinity groups, etc.): *

Please indicate how you plan to solicit your audience. : *

- Email
- Mail
- Phone
- All of the above
- Other - please explain

In what format are you requesting the data?: *

- Labels (there may be a modest charge from Office Services for printing labels)
- Excel file
- Other (please specify)

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