Policy

Directors shall draft "Call Reports" for all face-to-face meetings and "Contact Reports" for all other communications with current and prospective donors, Trustees, and alumni. Solicitors and staff may request research, reports, and other information on prospective donors to further Advancement Division goals.

Procedure

Call Reports and Contact Reports

1) These reports should include the name of the person contacted (and, if relevant, the company or foundation whom that person represents), contacting Director's name, date of meeting, type of meeting (*e.g.*, personal solicitation, phone call, email, etc.), and a summary of what happened during the meeting, and any further action required (and, if relevant, a date on or around which that action must occur).

2) A copy of these reports shall be entered into the existing computer records system and filed in central files (and in foundation and scholarship files, as is necessary).

Requests for Research, Reports, and Other Information

1) Requests for research on prospective donors must be submitted to the Director of Development Research.

2) To request reports, disks, mailing labels, and other information from Advancement Services, an Information Request Form must be completed and submitted electronically via the College's website (or, if the computer system is not functioning, as a hard copy to the Director of Development Research and Advancement Services Coordinator). *See* APPENDIX 2.

3) All research at Centenary will adhere to the Council for Advancement and Support of Education ("CASE") recommendations and Principles of Ethics and Confidentiality in Development Research. *See* APPENDIX 3.