



Memorandum

TO: Campus Users of RADR

FROM: Donna Gastevich, COO and Associate Vice President, Advancement Services (DIR)

CC: Stacey Scoville, Administrator to the Provost

DATE: August 18, 2014

RE: Donor Gift Documentation in RADR

With the rollout of RADR to campus users, Caltech for the first time will have a unified platform for sharing donor gift documentation with the staff members across campus who collectively share fiduciary responsibility for ensuring that gifts are spent in compliance with donors' intentions. This documentation contains information that is confidential and considered private in nature. Caltech upholds the industry's "Donor Bill of Rights" (see <http://bit.ly/Vqexqb>), which protects donor investments and declares that donors' gifts to the Institute will be handled with respect and confidentiality.

Recognizing the broader campus community's role as stewards and partners in assuring that contributions are used for the purposes for which they were given, DIR is eager to share donor gift documents with campus users. While validating data in RADR, however, it became apparent that we were at risk for not meeting the minimum confidentiality standards for these highly sensitive documents. As a result, when RADR goes live to campus users today, donor gift documents from DIR will not be included in the initial repository.

We are currently reviewing each fund/award to ensure that donor gift documentation in RADR will be accurate and up-to-date and will respect donor privacy. This review encompasses more than 1,500 donor funds. Our goal is to make the documents (donor agreements, award summaries, pledge intake forms) available as we validate them, starting with the largest donor funds that are actively being stewarded. To facilitate this effort, we ask that all division administrators provide a prioritized list of funds/awards for their respective divisions. DIR will review and upload documents related to these funds first, and then add documents for additional funds over time. For those divisions that cannot provide a list of funds/or awards, DIR will produce and prioritize a list based on gift size and other key criteria. Our goal is to complete this effort no later than November 30, 2014, and we intend to provide you with periodic status updates as we progress toward achieving this goal. In the interim, for one-off requests of donor gift documents, please contact Mike Conover, development records supervisor, at 626-395-2125 or [mconover@caltech.edu](mailto:mconover@caltech.edu) (alternate contact: Laura Grissom).

Thank you for your patience and understanding.