



# Oakland University

## Administrative Policies and Procedures

---

**SUBJECT:** REQUEST FOR CONSTITUENT INFORMATION

**NUMBER:** 510

**AUTHORIZING BODY:** VICE PRESIDENT FOR DEVELOPMENT, ALUMNI AND COMMUNITY ENGAGEMENT

**RESPONSIBLE OFFICE:** DEPARTMENT/UNIT

**DATE ISSUED:** NOVEMBER 1985

**LAST UPDATE:** MARCH 2009

**RATIONALE:** The Office of Development Information Services is responsible for access to and production of reports from the Banner Advancement module to meet the needs of University Departments for Constituent information. The production and circulation of Constituent information will only be given to school officials for purposes that support and advance the interests of the University.

**POLICY:** Approval of University Departmental requests for Constituent information will only be approved for fund raising appeals, surveys, program marketing materials, placement and admissions support programs, and the circulation of periodicals and newsletters.

**SCOPE AND APPLICABILITY:** This policy applies to all University personnel that require data on Constituents.

### **DEFINITIONS:**

***Constituent:*** A record in Banner that has a fundraising relationship to the University. Records may be person records or corporate and organization records where the relationship of the records could be that of a donor, an alumnus, or a potential donor.

**PROCEDURES:** All requests for Constituent information must be submitted using the "Banner Advancement Data Retrieval Form" (see [Exhibit A](#)), to the Director of Development Information Services in Development, Alumni and Community Engagement for approval.

### **RELATED POLICIES AND FORMS:**

[Exhibit A Banner Advancement Data Retrieval Form](#)

**APPENDIX:**



[Return to Table of Contents](#)