

OAKLAND UNIVERSITY

ADMINISTRATIVE POLICIES AND PROCEDURES

510 REQUEST FOR CONSTITUENT INFORMATION

SUBJECT:	REQUEST FOR CONSTITUENT INFORMATION
NUMBER:	510
AUTHORIZING BODY:	PRESIDENT'S CABINET
RESPONSIBLE OFFICE:	UNIVERSITY ADVANCEMENT
DATE ISSUED:	NOVEMBER 1985
LAST UPDATE:	APRIL 2026

RATIONALE:

University Advancement 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 requests for constituent information will only be granted for legitimate University purposes that support and advance the interests of Oakland University. Examples include:

- Fundraising and alumni engagement activities
- Student retention, admissions, and success initiatives
- Surveys and institutional research projects
- Marketing, outreach, and communications to alumni, donors, and other university partners

Direct access to Banner Advancement or derivative dashboards will be limited to University employees with a demonstrated business need.

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:

1. All requests must be submitted through University Advancement's ticketing system (i.e., advanceservices@oakland.edu)
2. Requests will be reviewed by the Advancement Data Stewards designated by University Advancement to ensure:
 - a. a legitimate business purpose,
 - b. the requester has the appropriate role and training, and
 - c. access is limited to the minimum data necessary.

RELATED POLICIES AND FORMS:

APPENDIX: