

BANNER ALUMNI/DEVELOPMENT DATA RETRIEVAL REQUEST FORM

Submit this form to  
Development Information Services  
John Dodge House, Oakland University (fax 248-364-6101)

**D.I.S. Only**

Date Received: \_\_\_/\_\_\_/\_\_\_

Job # \_\_\_\_\_

Approved by \_\_\_\_\_, Director of Development Information Services

Requestor: \_\_\_\_\_ Department: \_\_\_\_\_

Campus Address & Email Address: \_\_\_\_\_

Contact Person's Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

Date Submitted: \_\_\_\_\_ Date Needed By: \_\_\_\_\_

Have you previously requested a similar or identical output?  YES  NO Maximum number of records: \_\_\_\_\_

Name of Person who requested previous request: \_\_\_\_\_

Date of the previous request: \_\_\_/\_\_\_/\_\_\_ Job #: \_\_\_\_\_

**How will you use this output? Please check all that apply:**

- Contact with alumni or donors     Fundraising Solicitation     Event Invitation     Newsletters     Departmental Information
- Prospecting/Research     Management Report     Telefund    Other: \_\_\_\_\_

**Please describe your request: (REQUIRED)**

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If this is a fundraising solicitation, please indicate the solicitation code & description: \_\_\_\_\_

If you do not have a solicitation code please contact the Gift Accounting Manager at 364-6115 or email [tallen@oakland.edu](mailto:tallen@oakland.edu) to request one.

**Solicitation Information (Check all that apply)**

- | Include                  | Exclude                  | Records coded as:                  |
|--------------------------|--------------------------|------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Do not solicit (DNS)               |
| <input type="checkbox"/> | <input type="checkbox"/> | No fall telefund calls (NFT)       |
| <input type="checkbox"/> | <input type="checkbox"/> | No OUAA Magazine (NMG)             |
| <input type="checkbox"/> | <input type="checkbox"/> | Never Call (NVC)                   |
| <input type="checkbox"/> | <input type="checkbox"/> | Never Mail (NVM)                   |
| <input type="checkbox"/> | <input type="checkbox"/> | No planned giving newsletter (NPG) |

**Output Disposition: Check all that apply**

- Send to Contact Person listed above via Campus Mail
- Send to Contact Person listed above via Electronic Mail
- Send to OU Printing & Mailing Services
- FTP to Non-OU Mailing Services

**Output Format: Check all that apply**

- Hardcopy Report
- Datafile
  - Excel file
  - Access Database

**Indicate Name and Address of Non-OU Mailing Services below**

Mail Service Name \_\_\_\_\_

Mail Service Contact Person's Name & Phone # \_\_\_\_\_

Mail Service Address \_\_\_\_\_

FTP/E-mail Address \_\_\_\_\_

**Report Criteria (Check all that apply. Categories left blank will not affect your selection)**

**○ Constituents**

Household pairing:  Single (S)  Combined (C)

**Include Exclude**

- Alumni (ALUM)
- Parent (PRNT)
- Faculty/Staff (FAST)
- Retired Faculty/Staff (RFAC)
- OU Foundation Dir. (OUFD)
- Trustee (TRUS)
- Other Individual (OTHI)
- Friend (FRND)

**○ Organizations**

**Include Exclude**

- Corporation (CORP)
- Foundations (FOUN)
- Other Organizations (OTHO)
- Religious Organization (RELO)

**Record Status:**

**Exclude:** Deceased

**Employment Information: (Check all that apply)**

**Include Exclude**

- Current Employer (if in Banner)
- Current job title (if in Banner)
- Only employees of (company name, Banner ID if known) \_\_\_\_\_

**Academic Criteria: (Check all that apply) This section relates to an individual's OU degree information**

- OU undergraduate degree holders  OU graduate degree holders

**School(s):** CAS, SBA, SEHS, SECS, SHS, SON

**Include:**  All Schools  Specific Schools \_\_\_\_\_

**Degree(s):** Undergraduate or Graduate

**Include:**  All degrees  Undergraduate only  Graduate only  Preferred degree only

**Class years:**

**Include:**  All class years  Specific class years \_\_\_\_\_

**Majors:** (please include major code and descriptions)

**Include:**  All majors  Specific majors \_\_\_\_\_

**Department:**

**Include:**  All departments within school  Specific departments within school \_\_\_\_\_

**Address Criteria: (Check all that apply) This section relates to a constituent's or organization's mailing address, business address as well as geographic location.**

**Include:**  Active preferred address  Active permanent address (01)  Active Business address (BU)

**Exclude:**  Active preferred address  Active permanent address (01)  Active Business address (BU)

USA  Foreign Countries

States: \_\_\_\_\_ Countries \_\_\_\_\_

Zipcodes: \_\_\_\_\_

Zipcode Radius's: Records within a \_\_\_\_\_ mile radius of \_\_\_\_\_ zip code

**Salutations:** *This section relates to the salutations for a letter and the addressee for the outside of an envelope or piece of mail.*

- Salutation:**
  - Joint** (FORM) example: Mr. and Mrs. Doe
  - Individual** (PRIN) example: Mr. Doe
- Addressee:**
  - Joint** (JOIN) example: Mr. and Mrs. John B. Doe
  - Individual** (INDI) example: Mr. John B. Doe

**Additional Information** *This section relates to various information available in Banner records.*

- Activities/Student activities/Committees/Boards (*list can be found in APAACTY by double-clicking in "activity" field.*)  
**Include:**  All activities    Specific activities \_\_\_\_\_  
\_\_\_\_\_
  - Athletes (*athlete codes are also found in APAACTY by double-clicking in "activity" field.*)  
**Include:**  All sports    Specific sports
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**Donor Information:** *If your request involves specific gift information, you must complete this section. Check all that apply. To specify more than one population of donors, attach separate request form.*

- |                |                             |                               |                                   |                                      |
|----------------|-----------------------------|-------------------------------|-----------------------------------|--------------------------------------|
| <b>Include</b> | <input type="radio"/> Gifts | <input type="radio"/> Pledges | <input type="radio"/> Memo credit | <input type="radio"/> Matching Gifts |
|                | Date range: _____           |                               |                                   |                                      |
| <b>Exclude</b> | <input type="radio"/> Gifts | <input type="radio"/> Pledges | <input type="radio"/> Memo credit | <input type="radio"/> Matching Gifts |
|                | Date range: _____           |                               |                                   |                                      |

**Amount range:** \_\_\_\_\_

**Designations:** (*Example*) 30085 SEHS Gift Fund

**Include:**  All designations    Specific designations \_\_\_\_\_

**School/Division:**

**Include:**  All schools/divisions    Specific schools/divisions \_\_\_\_\_

**Departments:**

**Include:**  All departments    Specific departments

**Solicitations:**

**Include:**  All solicitations    Specific solicitations

Date range: \_\_\_\_\_

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**Membership Information:** (**Check all that apply**) *This section relates to an individual's participation in an OU membership program.*

**Membership Programs:**

- | <b>Include</b>        | <b>Exclude</b>        |       |
|-----------------------|-----------------------|-------|
| <input type="radio"/> | <input type="radio"/> | OUAA  |
| <input type="radio"/> | <input type="radio"/> | PCLUB |

**Membership Categories:** (*see ATVAMCT for list*)

- | <b>Include</b>        | <b>Exclude</b>        |                           |
|-----------------------|-----------------------|---------------------------|
| <input type="radio"/> | <input type="radio"/> | All categories            |
| <input type="radio"/> | <input type="radio"/> | Specific categories _____ |
| <input type="radio"/> | <input type="radio"/> | Specific categories _____ |

