THE UNIVERSITY OF MICHIGAN

STANDARD PRACTICE GUIDE

SECTION:	Development	**Number:**	602.05
		Revised:	2/10/06
SUBJECT:	Use and Release of Donor and Alumni Information	**Date Issued:**	7/15/91
		Review Date:	2/10/10
APPLIES TO:	All Departments and Units of the University	**Attachment(s)**	0
ISSUED BY:	Office of the Vice President for Development		

I. Policy

This policy relates to all information about alumni and donors of the University of Michigan. The University of Michigan owns this information and the Vice President for Development is responsible for maintaining it (Regents Bylaw 2.09). This policy regarding use and release of donor and alumni information is issued by the Office of the Vice President for Development (OVPD) and is applicable to all campuses and facilities of the University of Michigan. It is intended to allow development personnel and alumni relations' personnel to use information about our alumni and donors while ensuring that their privacy is protected to the fullest extent permitted by law. The information must not be given, sold, traded, exchanged, etc., to people or institutions not affiliated with the University of Michigan.

II. Donor Related Information

A. GENERAL STATEMENT. Donor information shall not be released except as permitted under this policy or as required by law.

B. DEFINITION OF DONOR INFORMATION. Donor information is defined as the name, any address, telephone number, gift history, ratings or any other information pertaining to a donor or potential donor to the University of Michigan, which is gathered by the OVPD, a development office of any college, school or unit within the University of Michigan, or any other University employee for development purposes.

C. ACCESS AND USE OF DONOR INFORMATION. Only University employees who are authorized by OVPD and who have a need to know in order to perform an authorized University function or activity may access donor information. Donor information shall be used solely for development purposes in accordance with applicable policies.

1. Units may release information to volunteers they designate to use information for such purposes as peer screening, donor ratings, and the like.

2. Each unit is responsible for ensuring that its designated volunteers use and distribute the information in the appropriate manner for its authorized function or activity and that the volunteers understand their responsibility to maintain the confidentiality of the information pursuant to these guidelines.

D. REQUESTS FOR DONOR INFORMATION. Any requests for donor information by any persons or entities not authorized to receive such information should be directed to OVPD or the Freedom of Information Office for handling, except for donors who donate in memory or in honor of someone. The names and addresses of donors who donate in memory or in honor of someone may be released to appropriate family members of that person memorialized or honored.

E. NONCOMPLIANCE. Failure to comply with this policy may result in denial of future access to donor information and other disciplinary action up to and including termination.

III. Alumni Related Information

A. GENERAL STATEMENT. Alumni information, other than name, degrees, schools and years (student information) will not be released except as permitted under this policy or as required by law.

B. DEFINITION OF ALUMNI INFORMATION. Alumni information is defined as the names, any addresses, telephone numbers or any other information pertaining to alumni of the University of Michigan, which is gathered after the individuals are no longer enrolled as students.[i]

C. ACCESS AND USE OF ALUMNI INFORMATION. Only University employees who have a need to know in order to perform an authorized University function or activity may access alumni information. Alumni information shall be used for alumni relations and development purposes in accordance with applicable policies.

1. Units may release information to volunteers they designate to use information for such purposes as planning reunions, assisting alumni clubs, and the like.

2. Each unit is responsible for ensuring that its designated volunteers use and distribute the information in the appropriate manner for its authorized function or activity and that the volunteers understand their responsibility to maintain the confidentiality of the information pursuant to these guidelines.

D. RELEASE OF ALUMNI INFORMATION WITHOUT PRIOR PERMISSION OF ALUMNI. OVPD's Alumni Records Office (ARO) will perform the following functions with respect to requests for alumni information without prior permission of the alumni:

1. Forward Requests. Forward requests from alumni seeking the address of other alumni[ii].

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[i] Student records are subject to the federal Family Educational Rights and Privacy Act. The Office of the Registrar is responsible for implementing University policy on access to student records.

[ii] ARO reserves the right to deny or charge a fee for a voluminous or unreasonable request.

2. Associated Organizations. Alumni information may be released to organizations associated with the University, but not under Regental control, only if the organization certifies in writing that:

   a) It will use the information only in an activity that will directly serve a function of the University. For student related organizations, the Vice President for Student Affairs or his or her designee must certify that the use of the requested alumni information will serve a University function. OVPD will have the final authority to determine if an activity will directly serve a function of the University.

   b) It will not use the information for any other purpose.

   c) It shall not release or disclose the information to any third party. It shall not release the information to a person affiliated with the organization unless that person has a need to know and that person agrees to maintain the confidentiality of the information pursuant to these guidelines.

3. Alumni Directories. ARO shall provide alumni information to University of Michigan schools, colleges and units wishing to publish an alumni directory pursuant to the policy on Alumni Directories (SPG 602.06).

E. RELEASE OF ALUMNI INFORMATION WITH PRIOR PERMISSION OF ALUMNI. Alumni information may be released in the following circumstances only with the prior written permission of individual alumni. Written permission includes indicators used by online alumni directories and updated by the alumni themselves signifying publication is acceptable.

1. Shared Alumni. When other institutions of higher education request information on alumni who have degrees from the University of Michigan and the requesting educational institution.

2. Other Alumni. At the request of other alumni.

3. Recruiting Firms. Requests from management recruiting firms will be forwarded to the appropriate unit placement office for service as authorized by its alumni clients.

F. RELEASE OF ALUMNI INFORMATION UNDER OTHER CIRCUMSTANCES. Alumni information may be released under the following circumstances.

1. Confirming Degrees. Requests from prospective employers and others should be directed to the Office of the Registrar.

2. Law Enforcement Agencies. Requests from law enforcement agencies for alumni information should be directed to the Department of Public Safety.

3. Subpoena Or Court Order. Alumni information will be released pursuant to court order or lawfully issued subpoena. Questions regarding court orders and subpoenas should be directed to the Office of the General Counsel.

4. All Other Requests. All other requests for alumni information from persons or entities should be directed to ARO or the Freedom of Information Office, as appropriate.

G. NONCOMPLIANCE. Failure to comply with this policy may result in denial of future access to alumni information and other disciplinary action up to and including termination.