

Institutional Advancement Data Request Form

Date of Request: _____ Date Needed: _____ Requested By: _____

Date Received: _____ Received By: _____

Purpose for Request: _____

1. Who do you want to include in this report/ mailing:

CONSTITUENT CODES TO INCLUDE

| | Include | Exclude |
|---------------------------------|---------|---------|
| Constituent Age (Specify) _____ | _____ | _____ |
| Alumni | _____ | _____ |
| Alumni Non-Degree | _____ | _____ |
| Corporations | _____ | _____ |
| Faculty/Staff | _____ | _____ |
| Foundations | _____ | _____ |
| Friends | _____ | _____ |
| Groups/Orgs | _____ | _____ |
| Mavs Booster Club | _____ | _____ |
| Parents | _____ | _____ |
| Students | _____ | _____ |
| Vendors | _____ | _____ |

ATTRIBUTE CODES TO INCLUDE

Boards:

| | Include | Exclude |
|------------------------|---------|---------|
| Alumni Board | _____ | _____ |
| Cabinet Members | _____ | _____ |
| Chair | _____ | _____ |
| Current Trustees | _____ | _____ |
| Former Alumni Board | _____ | _____ |
| Former Cabinet Members | _____ | _____ |
| Former Faculty/Staff | _____ | _____ |
| Former Trustees | _____ | _____ |
| Former Presidents | _____ | _____ |

Committees:

| | Include | Exclude |
|--------------------------|---------|---------|
| Alumni Admissions | _____ | _____ |
| Alumni Advancement | _____ | _____ |
| Alumni Campus Life | _____ | _____ |
| Alumni Career/Networking | _____ | _____ |
| Alumni Special Events | _____ | _____ |

Event Attendees:

| | Include | Exclude |
|-------------------|---------|---------|
| Golf Classic | _____ | _____ |
| Networking Events | _____ | _____ |
| Reindeer Run | _____ | _____ |
| Reunion | _____ | _____ |

Volunteers:

| | Include | Exclude |
|--------------------|---------|---------|
| Alumni Association | _____ | _____ |
| Golf Classic | _____ | _____ |
| Networking Events | _____ | _____ |
| Reindeer Run | _____ | _____ |
| Reunions | _____ | _____ |
| Special Events | _____ | _____ |

SOLICIT CODES

| | Include | Exclude |
|--|---------|---------|
| Colleges for Inauguration | _____ | _____ |
| Solicit Only for Allen Lee Downing Scholarship | _____ | _____ |
| Do Not Solicit/No Contact | _____ | _____ |
| Do Not Solicit via Phone | _____ | _____ |
| Do Not Solicit via Email | _____ | _____ |
| Solicit Once A Year | _____ | _____ |
| Solicit Only for Magazine Mailing | _____ | _____ |
| Solicit Only for Golf Classic | _____ | _____ |
| Solicit Only for Golf In-Kinds | _____ | _____ |

MAJOR GIFT CLASSIFICATIONS

| | Include | Exclude |
|--------------------------------|---------|---------|
| Suspect | _____ | _____ |
| Prospect | _____ | _____ |
| Prospect Informed | _____ | _____ |
| Prospect Involved | _____ | _____ |
| Proposal Defined | _____ | _____ |
| Solicitation Opened | _____ | _____ |
| Solicitation Complete-Accepted | _____ | _____ |
| Solicitation Complete-Refused | _____ | _____ |
| Stewardship | _____ | _____ |

MAJOR GIFT PROSPECTS BY Codes

| | Include | Exclude |
|-------------------------|---------|---------|
| Excellent (MGL > = 751) | _____ | _____ |
| Very Good (MGL 601-750) | _____ | _____ |
| Good (MGL 551-600) | _____ | _____ |

MAJOR GIFT PROSPECTS BY CATEGORY

| | Include | Exclude |
|--------------------------|---------|---------|
| Major Gift Prospects | _____ | _____ |
| Planned Giving Prospects | _____ | _____ |
| Annual Fund Prospects | _____ | _____ |

MAJOR GIFT PROSPECT - TARGET RANGES

| | Include | Exclude |
|------------------------------|---------|---------|
| TGR (6,7) = \$1,0001-\$5,000 | _____ | _____ |
| TGR (8) = \$5,001-\$10,000 | _____ | _____ |
| TGR (9) = \$10,001-\$25,000 | _____ | _____ |
| TGR (10,11,12) > \$25,000 | _____ | _____ |

EDUCATION

| | Include | Exclude |
|-------------------------------|---------|---------|
| Class Of (Specify Year) _____ | _____ | _____ |
| Degree (Specify) _____ | _____ | _____ |
| Major (Specify) _____ | _____ | _____ |
| GPA | _____ | _____ |
| Entry Date | _____ | _____ |
| Graduation Date | _____ | _____ |
| Additional Education | _____ | _____ |

GIVING CRITERIA

| | Include | Exclude |
|--------------------------------|---------|---------|
| Average Gift | _____ | _____ |
| Last Gift | _____ | _____ |
| Largest Gift | _____ | _____ |
| Gift Amount(s) (Specify) _____ | _____ | _____ |
| Gift Date(s) (Specify) _____ | _____ | _____ |

| <u>Gift Types:</u> | Include | Exclude |
|----------------------------|---------|---------|
| Cash | _____ | _____ |
| Pledge | _____ | _____ |
| MG-Pledge | _____ | _____ |
| Stocks | _____ | _____ |
| Pay-Cash (Pledge Payments) | _____ | _____ |
| Pay-Stock | _____ | _____ |
| Gift InKinds | _____ | _____ |
| Soft Credits | _____ | _____ |

Funds and Appeals:

(Specify) _____

You will find a list of funds and appeals on the IA Dept. shared drive in a folder called Funds and Appeals.

2. How would you like the name to appear:

| <u>NAME FORMATS</u> | Include | Exclude |
|--|---------|---------|
| Individual Name (Mr. John Smith, Jr.) | _____ | _____ |
| Individual Salutation (Mr. Smith) | _____ | _____ |
| Primary Addressee (Mr. and Mrs. John Smith, Jr.) | _____ | _____ |
| Primary Salutation (Mr. and Mrs. Smith) | _____ | _____ |
| Spouse Name (Mrs. Linda Smith) | _____ | _____ |
| Nickname | _____ | _____ |
| Maiden Name | _____ | _____ |

Other (Specify) _____

3. How do you want to receive the above information:

Desired Format: _____

Labels____ Letters/Envelopes____ Mass Email ____ Mailing List____ Report Only____

Date Request Completed _____

Completed By _____

Note: Please only fill in the required fields needed to fulfill your request. It is not necessary to check all available fields on the data request form.

Note: All deceased, invalid addresses, opt-outs, do not solicit or no contact will be excluded from all data requests unless you specify to include them.

Please submit your data request form to:

Vicki L. Ward
 Institutional Advancement Office
 (716) 880-2209