



Advancement Services Data Request Form

This form must be completed and e-mailed to ua-foundationhelp@alaska.edu for all list requests, such as mailed invitations, e-mailed solicitations, newsletters, phonathons, etc.

To reduce paper waste, please digitally sign this document, save to your computer and either attach the form in an e-mail if you use web-based email, or click the Submit Form button above if you use Outlook.

* indicates required field

***Requester's Information:**

Name: _____

Campus: _____

Department: _____

Date (e.g., 06/20/2013): _____

Email Address: _____

Phone #: _____

***When do you need this report?** (Two weeks is required to process) Please list an actual date: _____

Preliminary Qty needed for printing preparation by this date: _____

***Will this report be a recurring request?** Annually Quarterly Monthly Weekly

***Provide a DETAILED DESCRIPTION of the criteria for this report – some groups listed below for your convenience.** (e.g. all SOM alumni--specify graduates only or graduates and matriculates; all donors to a certain scholarship; all female administrators, etc. **If requesting donors, please specify whether soft credits and/or matching gifts should be used as a selection criteria.** *Be aware that many different university and non-university related groups are tracked in Raiser's Edge. If you unsure of whether the group you want to include is tracked in RE, contact Advancement Services by e-mailing ua-foundationhelp@alaska.edu . Or, [view a list of common groups to include here.](#)*

UA Employees? Campus: UAA UAF UAS SW
Further instruction:

UA Alumni? Campus: UAA UAF UAS
Further instruction:

UA Donors? Campus: UAA UAF UAS SW
Further instruction:

Other groups or selection criteria to include:

***How will the data be used?** Be specific please (If for fundraising purposes, it is your responsibility to obtain approval of your fundraising materials from your campus' Development office and the Foundation's Advancement Services office before we will release the data to you).

Check all that apply:	Mailing	E-mail	Phone Contact
Reason for contact:	Solicitation	Stewardship/Thank You	Cultivation/Newsletter/Survey
	Invitation	Other: _____	

***What data do you need regarding the select group(s) you described above?** Data requests are provided in Microsoft Excel format from which you can mail merge into letters, labels, etc. Please complete this section so we know what specific fields to provide to you. Not all data requested will be available for every constituent.

- 1. ***Limit my report's data to these campus(es):** UAA UAF UAS SW ALL
- 2. ***Address, Phone, Salutations and Email Information Needed on Report:**

Address:	Preferred	Home	Business	
Phones:	Preferred	Home	Business	Cell
Email:	Preferred	Home	Business	University of Alaska

The preferred address is always the best address available to mail to.

Salutations:	Formal Joint Addressee <i>(e.g., Mr. and Mrs. Greg Jones)</i>	Formal Joint Salutation <i>(e.g., Mr. and Mrs. Jones)</i>
	Informal Joint Addressee	Informal Joint Salutation
	Household Addressee <i>(e.g., Jones Family)</i>	

Other Salutation _____
Recognition name will always be included so you can identify donors who wish to remain anonymous. We do not recommend using this field for your mail/email merge.

- 3. ***Individuals - Combining Households or Spouses:**

Head of Household only (one spouse) on the report?	Other Instructions:
Both spouses listed on the report separately?	

- 4. **Organizations – if applicable:**
 How many campus contacts do you want exported: ____

What Contact Types to include?:

UAA Contact	UAA Athletics	UAA Letters	UAS Contact
UA Foundation	UAF Contact	UAF Athletics	UAF Scholarship
UAF Media	KUAC Contact	Museum Contact	Museum Corporate
Fund Contact – Donor Report		Fund Contact – Invitation	

Other Contact Type: _____

Only include these specific Organizations in the report (Name and Raiser's Edge ID):

List of all employees or members of a specific Organization:

Organization Name(s) and Raiser's Edge ID(s):

Include this Employee/Member information:

Name	Position	Date From	Date To
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5. Education Information:

How many Degrees on Report? _____	Alumni?	Matriculates?
UAA UAF UAS	All Campuses (Incl. Non-UA Campuses)	

Include this Education record information:

Date Graduated	Degree	Major	Minor	College/School
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Only include these specific schools or colleges: _____

Only include these specific degrees: _____

Only include these specific majors: _____

Please note that in past years many different schools, colleges, degrees and majors have been renamed. Be sure to include all past and present relevant names.

6. University of Alaska Employee Information:

Employee of:	UAA	UAF	UAS	UA Statewide
	Current Department		Current Position	Time Keep
	Date From		Date To	

Only include these specific Departments: _____

Only include these specific Positions: _____

7. Giving Information Needed on Report*:

None

UAA UAF UAS All University Giving

Include/Exclude/Only Report on these UAF fund types:

UAF Athletics UAF Garden UAF KUAC UAF Museum

Only include these specific colleges or Schools: _____

Exclude these specific colleges or Schools: _____

Only include these specific fund numbers: _____

Include Planned Gifts?

Include soft credits and matching gifts?

Report First Gift? Amount Date Type Fund

Report Last Gift? Amount Date Type Fund

Report Gift Summary? All Giving? or, Date Range? _____

By FY? List Fiscal Years: _____

By CY? List Calendar Years: _____

*CASE approved giving criteria is used unless otherwise specified below

Further giving information instructions:

Advancement Services is not responsible for how data is used, or further distribution thereof. The database is updated on a daily basis. Do not reuse any data provided as a result of this request. You must request refreshed data before using again. You will use the Data in the Systems only for legitimate Foundation and/or University activities for which you are authorized. After completing the activity, all records (electronic and paper) should be destroyed. You will not exhibit or divulge the contents of any Data to any person except in the conduct of your work assignment in University Relations, Development, Alumni Relations, Advancement Services, or any other departments or units engaged in these functions. **Your signature indicates you understand and agree to abide by these policies.**

Signature: _____ Date: _____

OFFICE USE ONLY:

Query Name: _____ Export Name: _____

Final file location on server: _____

Completed by: _____ Date Completed/Sent _____

Foundhelper File #: _____

Advancement Services Data Request Form – Addendum 1

Please include any additional instructions here: