SONOMA STATE UNIVERSITY

Advancement Data Request Form

> *Please allow a minimum of 3 weeks to process your request. Complex requests may take longer. Contact University Advancement if you need assistance defining criteria or output fields.*

Please complete all sections (including Dean/VP approval) and send this form to advancement@sonoma.edu for review/approval

SECTION 1 - General

List/Event/Report Name: Person Making Request:

Date of Request: **Date Required:**

Purpose: ☐ Mailing/Invitation: *Hard copy*   *Digital*   ☐ Solicitation   ☐ Newsletter   ☐ Donor Recognition

☐ Other (please specify)

Purpose of Request *(include __in detail__ why you want this data and how it will be used e.g., hardcopy only newsletter mailing, email only invitation, invitation mailing only, email and telephone, etc.)*

SECTION 2 – Which records do you want to specifically include? *(Constituent ID will be included by default)*

<u>INCLUSIONS</u> – Please check/specify ALL that should be included. If you are requesting gift information, please complete section 4

☐ Alumni   College/School/Dept: ☐ Major: ***include minors?***

Class of:

☐ Business/Orgs   ☐ Board Members (board name)

☐ Other

SECTION 3 – Which records do you want to specifically exclude? *(Contact Codes of No Contact or Communication will be excluded by default)*

<u>EXCLUSIONS</u> – Please check/specify ALL that should be excluded:

☐ Out of State   ☐ Out of Country   ☐ Deceased   ☐ Anonymous

☐ **Other** (please specify)**:**

SECTION 4 – If you are requesting gift data complete this section. *(Please also select corresponding output fields on page 2)*

Gift Information: **What specific gift data are you requesting?** *(Alumni donors to x fund(s); all gifts 1/1/20-12/31/20):*

☐ *All time*   ☐ *Date Range*   **Gift Dates:**

Gift Fund(s) *Please list all fund IDs that apply***:**

Please check all donor types that apply:

☐ **Individual donors**   ☐ **Include donating businesses/organizations**

SECTION 5 – What data do you want to see for each record? Please check the corresponding box for the information you want to see in your results output. *(First and Last name will be included by default)*

<u>OUTPUT FIELDS:</u>

☐ **Name:** ☐ First ☐ MI ☐ Last ☐ Nickname ☐ Maiden

☐ **Spouse Name**

☐ **Addressee (e.g., Mr. and Mrs. Sam Sonoma)**

☐ **Salutation (e.g., Mr. and Mrs. Sonoma)**

☐ **Address (postal)**

☐ **Emails:** ☐ Primary ☐ Secondary ☐ Business

☐ **Phone: –** ☐ Home ☐ Business ☐ Mobile

☐ **Grad Date/Class of (alums only)**

☐ **Age (when available)**

☐ **Major**

☐ **Degree**

☐ **Anonymous Donor**

☐ **Primary Constituent Code**

☐ **Prospect Manager – current and/or most recent**

☐ **Alumni Association Membership**

<u>Did you complete section 4 gift information</u>? ☐ Yes (complete gift fields below) ☐ No

Gift Detail: ☐ Gift Amount: ☐ Gift Date ☐ Gift Fund ID ☐ Fund Description

Gift Summary: Date Range: ☐ Total Giving Amount ☐ Total Number of Gifts

☐ Other data (please specify):

SECTION 6 –File Format/Sorting: **Lists will be provided in Excel format and sorted by last name.**

SECTION 7 – Approval

The information being requested is for the sole use of the intended recipient(s) and may contain confidential and privileged information. Any unauthorized review, use, disclosure or distribution is prohibited. By signing below, you agree to use the data only for the purpose described in this request, and to not store, reference, transmit, share, or otherwise make any use of the data beyond completion of the purpose (max 90 days after receipt of the data). The data will be used to support University business.

Data User (person who will receive a copy of the data): _____

Dean/VP Signature: _____

<table>
<tr><td colspan="2"><i><u>For Processing use only—please do not write in this space</u></i></td></tr>
<tr><td>Date Received: _____</td><td>Output File Name: _____</td></tr>
<tr><td>Date Completed: _____</td><td>Output File Path: _____</td></tr>
<tr><td>Completed By: _____</td><td>Query/Export Name: _____</td></tr>
<tr><td>Date Requester Notified: _____</td><td># of Records: _____</td></tr>
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