**The purpose of this form is to ensure that your needs are communicated and to help you think critically about the type of list you need and why you need it. If you have a more detailed request that you feel cannot be communicated on this form, we can set up a time to speak.**

**Name of Requestor**

**Purpose of Data:**

**What kind of list are you looking for?**

Constituent

Giving

Action

Campaign

Fund

Appeal

Individual Relationships

**How will the list be used?**

Solicitation

Event

Newsletter Mailing

Report

Other:

**Data Due By:**

Date:

PLEASE ALLOW A MINIMUM OF TWO BUSINESS DAYS FOR PROCESSING

Notes:

**Data Request INCLUDES:**

**What record types do you want included?**

Constituents

Businesses

Foundations

**Do you want to pull using Head of Household, or do you want each individual to be listed?**

Other:

**Data Request EXCLUDES:**

**Who do you want to make sure is NOT included in this data?**

None - please include everyone

FH Board Members

FH Alumni

FH Employees

Do Not Contact

Do Not Mail

Do Not Phone

Do Not Send Publications

Do Not Solicit

Do Not Solicit for Annual Fund

Deceased

No Valid Mailing Address

Other:

**Please give more detail on the types of gifts you would like included in your gift information:**

**Are there specific gift types you DO NOT want included?**

**Data Output:**

What data do you need to see? Think about how you are going to be analyzing or sorting this data, and make sure the fields you need for that analysis are included.

Full Name

Maiden Name

Nickname

Spouse Name

Constituency Code

*(Please specify which code, and how many, if looking at constituents with multiple codes, i.e., Alumni or Employee, or both.)*

Constituency Code Date From or To: *(eg: Alumni Date To would equal Discharge Date)*

Primary Addressee

Primary Salutation

Joint Addressee

Joint Salutation

Preferred Address (incl. Address, City, State, Zip)

Email Address

Home Phone

Cell Phone

Work Phone

Business Info (incl. Name, Position, Business Address)

Last Gift Info (incl. Date, Amount, Fund)

Largest Gift Info (incl. Date, Amount, Fund)

Total Amount of Gifts

Total Number of Gifts

Pledge Balance

Date of Pledge

Other Output:

**More Detail:**

**Please provide more detail about your report request here if you need to clarify. The more information we have, the better.**