

University Advancement Invitation, Mailing, Solicitation, and Information Request Form

This form is to be used to request information for invitations, mailings, solicitations, or constituent information from the Indiana State University Foundation. This information will be prepared from Raiser's Edge.

Please submit all requests to University Advancement no later than **2 weeks** prior to the date needed. The information will be sent to you by email. For questions, contact Robyn James, Director of Advancement Services at 812-237-6163 or send an email to Robyn.James@indstate.edu.

Date Requested: _____ Date Needed: _____ List Name: _____

Your Name: _____ Phone Number: _____

Email Address: _____

Section A: Purpose and Usage – Complete this for all requests

Purpose of List

- Information/Research
- Survey
- Newsletter/Magazine
- Other _____

Solicitation: Appeal Code _____

Stewardship

Invitation: Event Code _____

Event Appeal Code _____

(Needed if money will be collected.)

Method of Contact

- Mail
- Email
- Phone
- Other _____

Date you expect to send mail, email, or call: _____

Approximate number of records preferred: (This helps in preparation of the list) _____

Explanation of Request

What do you want to accomplish with this list? (i.e. I'd like to send a newsletter to all educators including secondary educators in all colleges) Please be specific in your criteria. Please specify Fiscal Year where applicable.

Section B: Who and What – Complete this section for all requests

Alumni and Friends

- All Alumni
- College Alumni: _____
- Emeriti Faculty
- Major Code(s): _____
- Minor Code(s): _____
- Regional Alumni: _____ 30 Miles 50 Miles 75 Miles Other _____
- Other _____

Mailing Output

I would like addresses for: Households Individuals

Foundation and University Boards

- Alumni Board
- Foundation Executive Council
- Emeriti Foundation Board Member
- ISU Foundation Board Member
- Past Alumni Board
- Past Alumni President
- President’s Cabinet (University)
- President’s Council (University, Includes all **Deans**)
- President’s Advisory Board
- Sycamore Foundation Holdings Board
- Trustees
- Past Trustees

Deans

Donors

- All Donors of \$ _____
- Donors to Fund(s) _____
- Current Fiscal Year Include Exclude
- Previous Fiscal Year Include Exclude
- Other Donors: _____

Top Constituents

- 1865 Society
- Book and Torch Society
- Distinguished Alumni Award Honorees (DAA)
- Cornerstone Society
- Legacy Award Honorees
- Dale Mckee Society

Section C: Detailed Output – Complete this section only for additional information beyond typical mailing needs

Employment, Giving History, and Spouse Information are usually not given in order to maintain the privacy of our alumni

Please list additional information needed:

Section D:

File Format: All lists will be created as an Excel spreadsheet unless specified

RE Coding:

If known, please include the applicable code for this list

Appeal Code: (For solicitations only) _____

Event Code: (For events only) _____

Action Type: (To code as other mailing on records) _____

Date Completed: _____

Number of Records: _____

Constant Contact

Does this need to be uploaded to Constant Contact?

List Name _____ Date Uploaded _____ Number of Records _____

Signatures

Requestor’s Signature: (Can be typed) _____

Supervisor/Dean/Professor Signature _____

Advancement Services Director Signature _____

All data and information that comes through the Foundation offices or is located on the Foundation database is confidential. Information is not to be shared with others, including other offices of the University that do not have privileges to it and others outside of the Foundation and University, including third parties, family and friends.