

REQUESTING CONSTITUENTS LISTS

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Requests from Internal Constituents

Internal constituents should request lists through the University Advancement Division Donor Relations Office. *There is no charge for this service.*

Requests from External Constituents

Public records copies will be released only when authorized by the donor or as required by law. The University Advancement Division is responsible for creating and maintaining information about donors and alumni of Texas State. The University allows advancement personnel to use this information while ensuring that the privacy of alumni and donors is protected. The information must not be given, sold, traded, exchanged or otherwise shared with people, institutions or commercial interests not affiliated with Texas State.

Requests should be made with as much lead time as possible. In order to allow ample time for generating and editing data, lists are to be requested at least **10 working days** prior to mailing.

State the purpose of the request, whether it is for invitations, newsletters, correspondence or solicitation. Provide a copy of the material to be distributed.

Solicitation codes are on every database record. It is the responsibility of the requestor to honor the following restrictions when generating information:

- *Do NOT Mail:* Requests no mail
- *Requests NO contact from Texas State:* DO NOT send anything – period.
- *Do NOT Phone:* Requests no phone calls
- *Requests Privacy* – Requests information not be shared with third party
- *Do NOT Solicit in ANY Way* – Requests no contact asking for money

Distinguish whether the information requested is to be sent electronically or as a hard paper copy.

Define the intended audience: Alumni; Corporation; Foundation; Organization; Parent; or Individual.

State a minimum contribution amount and the specific geographic area. This information assists the requestor in narrowing the search. (i.e., The results of a search for every alumnus in Hays County are 6,073 individuals; however, when adding the criteria of the number of alumni in Hays County who have given at least \$50 to Texas State University-San Marcos, that number is 518 individuals.)

To assist with the request criteria please go to <http://www.ua.txstate.edu/> and see Attachment I of UA PPS 01.01.

REVIEWERS OF THIS PPS

Reviewers of this PPS include the following:

Position

Director of Donor Relations – Senior Reviewer
Assistant Vice President for Development, University Advancement
Vice President for University Advancement

CERTIFICATION STATEMENT

This PPS has been approved by the following individuals in their official capacities, and represents Texas State policy and procedure from the date of this document until superseded.

Assistant Vice President for Development, University Advancement

Vice President for University Advancement