

List & Report Request Form Fields

WFAA staff and UW campus partners are responsible for submitting List & Report requests to the BI/Reporting team that provide necessary information. This ensures requests are processed correctly in ABE.

Note that some fields display only when necessary, depending upon your form selections.

List Field Name	Description
Name	Name of requester
Email	Email of requester
CC email	Include emails of the people you would like included on <u>all</u> questions and communications regarding your Help Center ticket.
Phone	Phone number of requester in 10-digit formation (XXX-XXX-XXXX)
Are you an employee of the Wisconsin Foundation & Alumni Association?	Provides a Yes/No choices
WFAA Division	Select from a list of WFAA divisions.
<i>Field appears only if you have indicated you are an employee of WFAA.</i>	Do not select Marketing Division unless you are part of the WFAA Marketing Division.
Campus Unit you are representing	Select from a list of main campus units, including UWF/WAA. An Other option is provided for units not listed.
If Other, please indicate your campus unit <i>Field appears only if you have specified Other as the campus unit you are representing.</i>	Supply the name of your campus unit if Other is selected under Campus Unit you are representing .
Department/Program Area	Enter the department, center, or program you are representing.
List/Report Name	Be descriptive; consider include campus unit, department, program or project;
What is this request for?	An <u>Information Report</u> contains data for analysis, but it does not include communication data such as email addresses, postal addresses, and phone numbers. A

	<p>common use of a report is to evaluate constituent information to plan, identify targets, and understand volume.</p> <p>A <u>Communication</u> contains constituent (e.g. alumni and donor) information, and it includes communication data such as email addresses, postal addresses, and phone numbers. List data may be used by the requester in his/her own marketing/communication processes.</p>
<p>Channel of communication</p> <p><i>Field appears only if you have specified Communications/Marketing as the purpose of the request.</i></p>	Select all the types of contact information you will need.
<p>Who is the communication from?</p> <p><i>Field appears only if you specified Communications/Marketing as the purpose of the request.</i></p>	Select all that apply. These selections inform which solicit codes (restrictions/opt-outs) are applied to the contact information. If a constituent does not wish to receive communications from a particular unit/department we honor those requests.
<p>Intent of communication</p> <p><i>Field appears only if you specified Communications/Marketing as the purpose of the request.</i></p>	This selection informs which solicit codes (restrictions/opt-outs) are applied to the contact information. If a constituent does not wish to receive newsletters from a particular unit/department we honor those requests.
<p>Desired Delivery Date of Report</p> <p><i>Field appears only if you specified Information Report as the purpose of the request.</i></p>	The date when the report will be delivered by the BI team
<p>Review File Output Date</p> <p><i>Field appears only if you specified WFAA Marketing Division and Communications/Marketing as the purpose of the request.</i></p>	<p>Date when the requester expects a first draft of the initial request.</p> <p>If a detailed review is required, make sure to allocate time in your project schedule for a list review.</p>
<p>Final List Date</p> <p><i>Field appears only if you specified Communications/Marketing as the purpose of the request.</i></p>	Date the Final List will be delivered by the BI Team.

<p>Anticipated Send Date of Communication</p> <p><i>Field appears only if you specified Communications/Marketing as the purpose of the request.</i></p>	<p>The date the email will actually send or when the piece will be mailed.</p>
<p>Provide details of your list request</p>	<p>Provide your list description here. (See Appendix A for some help with parameters and output options.)</p>
<p>ABE Event Lookup ID(s)</p>	<p>When an event is created in ABE, a unique lookup ID is automatically assigned. You will most likely need it if you are sending an event invitation. If your event has already been created in ABE, please include the Event Lookup ID. Otherwise, leave this blank.</p> <p>Indicate the event ID provided by the Registration team.</p>
<p>Estimate of count</p>	<p>Estimate to confirm the query matches expectations for the count if known.</p>
<p>Name Format Options</p> <p><i>Field appears only if you specified Communications/Marketing as the purpose of the request.</i></p>	<p>Name format types are managed by WFAA Information Services.</p> <p>Only First Class Formal option includes punctuation in the addressee.</p>
<p>Should we list your school/college/unit alum first in salutation?</p> <p><i>Field appears only if you specified Communications/Marketing as the purpose of the request.</i></p>	<p>The alumnus/alumna of your school/college/unit will be listed first in the Name Format.</p>
<p>Additional Data fields to include in review file</p>	<p>Data fields needed to filter by or needed for review on the list. May not be the same as the fields in the final output file.</p>
<p>Fields to include in final output</p>	<p>Data fields needed to send a communication can include fields other than email/mail/phone (e.g. WAA member ID, degree).</p>

Include spouse even if they don't meet your parameters listed above?	If Yes , spouses would be included even if they do not meet your parameters. These are important to consider for events and stewardship.
Send one piece per household?	Appears only when a Mail list is selected. Indicates file that the should be spouse-linked.
Include international constituents?	Include international constituents. This is important to consider for postage costs.
Include organizations/corporations?	Examples are IBN, Fidelity Investments, MacArthur Foundation. These are not typically included for communications.
Include deceased constituents? <i>Field appears only if you specified Information Report as the purpose of the request.</i>	These constituents will never be included on a communication list.
How will this information be used?	Explain your purpose for this list or report.
With whom will this be shared?	Will your list be shared with anyone outside UW-Madison?

APPENDIX A: Detail of List Request

Below is a list of parameters and/or output fields to consider including in your list or report request.

- Donors
 - Period of giving:
 - The time period, such as 2014 or a more specific range (e.g. 8/13/2013 – 12/31/2014)
 - If you would like the last 10 years, please include the beginning date and end date, (e.g. 1/1/2005 through 12/31/2014)
 - Types of giving:
 - Outright Gifts: payments made during a time period that are not tied to a pledge or planned gift
 - Matching Gifts: payments made by a Matching Gift Company to match a constituent's gift. The original payment from the constituent is usually received prior to the match and may be as far back as one year.
 - Payments on Pledges: payments made by constituents on pledges. Constituents can also make payments on other constituents' pledges.
 - Cash-in-the-door: all payments, which would include outright gifts, payments on pledges, and payments on planned gifts. We can exclude or include matching gifts (from a company).
 - Pledge: the full value (initiation pledge amount) of the pledge for pledges made during a time period.
 - Outstanding pledges: the balance due on a pledge. Outstanding pledges are calculated as of today. Pledges can be included based on the date they were initiated to limit which pledges are included or we can include all outstanding pledges regardless of when they were initiated.
 - Planned gifts: the full value (initiation pledge amount) of the planned gift made during a time period. Planned gifts can have an amount or no amount, so it may be most helpful if we provide Planned Gift information separately.
 - Household giving: you can choose to have both spouses listed, even if the gifts were not given jointly; or you can choose to have spouses listed only when gifts were given jointly. The most popular choice is the latter.
 - Some of these types of giving can be added together. Outright Gifts and Pledges can be combined to get a sense of total commitment. Cash-in-the-door and Pledges cannot because payments on pledges are already being counted in Cash-in-the-door and that would be double counting.
 - Example: total giving by year for the past 10 years, including pledges and gifts by household. The best way to do this is to provide Cash-in-the-door summed to the year for every year since 2015. Outstanding Pledges could then be calculated based on what is outstanding as of the day we produce the report.
- General
 - Age
 - Gender
 - Region
 - City, State, Zip

- Organizations
- Preferred name format overrides all name-formatting options (regardless if you choose Standard & Formal)
- Characteristics
 - Giving Capacity
 - Likelihood scores
 - Attributes: Affinity Lists, Professional Organizations
 - Education involvement
 - Committees (current and/or previous members) for specific unit/department
 - Recognition Society (VHS, BHS, 1848, Legacy)
 - Constituents whom have an ABE Prospect Plan for which someone is the primary or secondary plan manager or additional solicitor
 - Previous attendees/invitees to an event
- Alumni
 - Unit, degree, department, year
 - Based on first, last or all degrees
 - Certificates (do not have all in ABE)
 - Recent graduate, young alumnus/alumna (please provide specific years/ranges)
- Spouses
 - Determine if spouses should be included even if they do not meet your parameters.
 - Specify how the address should look: alumnus/alumna first, donor first, female first?
 - Contact method mismatch issue (e.g. if we have an email for the spouse, but not the alumnus/alumna, should we spouse email only?)