



The UNIVERSITY of NORTH CAROLINA at  
**CHARLOTTE**

**DIVISION OF UNIVERSITY ADVANCEMENT  
ADVANCEMENT OPERATIONS**

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## Data Requests

### Overview:

The Advancement Operations Department maintains top hierarchal responsibility for all University Advancement data. Part of this responsibility requires the careful, controlled, and consistent distribution of data to authorized audiences.

In order to adequately serve our clients in the most efficient and professional manner, the Office of Advancement Operations has created and made available our policies, procedures, and processes in regards to data requests.

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## Data Requests:

### Project Manager

The Project Manager for Business and Systems Processes is the official point of contact for all data requests. Any requests submitted to other parties within the Advancement Operations team will be re-directed to the Project Manager.

### Report Request Form

The report request form which is currently available by email from the Advancement Operations Team is the official form to be utilized in requesting data.

### Emergency Requests

The Advancement Operations Team acknowledges that emergencies and/or short advance notice events occur. If your report request is urgent, you must still fill out the report request form where you will have the opportunity to notate the date requested on the first page of the survey.

Failure to complete the form may result in a potential delay in your request as the information necessary for completing your request must still be determined and verified.

**It is advisable that you follow-up your form submittal with a phone call to the Project Manager.**

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## Data Delivery Timeline

### The 1-3-10 Standard

In order to provide dependable and consistent service, The Advancement Operations Team has developed a guide to our 1-3-10 timeline for standard report requests.

**One Business Day:** You will receive an acknowledgement of your request being received within one business day.

**Three Business Days:** The Advancement Operations Team will alert you within three business days if there are any questions or needs for clarifications in regards to your request.

**Ten Business Days:** The standard turn-around time for report requests.

### Urgent Requests:

The Advancement Operations Team acknowledges that emergencies and/or short advance notice events occur. If your report request does not fit in the standard 1-3-10 timeline, you will have the opportunity to notate the date requested on the first page of the survey. Please note that a business rationale of why this is a rush report must also be included. We will do our best to accommodate you in your requested timeframe.

## Consultations

University Advancement data is a significantly large (six figure) database of alumni, individual, corporation and foundation records. This data may be difficult to digest for many. Advancement Operations thus requires the following consultations when data requests are made. All requests are made after the successful submittal of the Report Request form, and all consultations will be facilitated by the project manager.

### Required Consultations

In certain instances a consultation is required by Advancement Operations prior to beginning work on a data request:

#### *First Time requests*

The first time an individual makes a request for data it is required that they are available for a consultation. The consultation will be to review the submitted request and verify that the submitter is familiar with the Advancement Operations processes and policies for data usage and data report generation.

#### *Non-Standard requests*

Requests that fall out of the standard data request that are outlined in the report Request form require a consultation with the project manager to determine all the necessary data requirements and planned utilizations of the report.

### Optional Consultations

Advancement Operations offers the below consultations with clients as an optional service if requested.

#### *The 1-3-10 Standard*

Following the path of the 1-3-10 timeline, consultations are available for each stage:

##### ONE

You may request a consultation at the time of the one business day acknowledgement of your request submittal if you wish to review your request with the project manager.

##### THREE

You may request a consultation at the time of three business day mark to review and discuss any raised questions or requests for clarifications by the Advancement operations team in regards to your data request.

##### TEN

You may request a consultation at the time of ten business day mark to review your delivered report with the project manager.

#### *Report Review*

At any time after the report has been delivered you may request a consultation in regards to your report to discuss the findings and data contained.

#### *Process Review*

At any time you may request a consultation in regards to the data request process.

## Sign-Offs

Due to the volume of data, diverse client needs, and varied nature of requests to Advancement Operations, it is necessary to confirm the veracity of data reports from requested requirements through accepted delivery of report. In order to verify that all parties are in agreement during these multiple stages, the following sign-offs will be required.

### Report Request Submittal

The submittal of a report request via the Report Request form is viewed as your sign-off for the work to proceed on the data request. If there is no need by the Advancement Operations team to clarify your request you will receive the report as you originally detailed on the form.

### Clarifications

If there is a determination by the Advancement Operations Team that your report requires clarifications and/or modifications, you will be required to sign-off on the new functional requirements for the report before work can proceed. Failure to do so will result in the delay in the delivery of your report.

### Delivery

You are requested to sign-off on your report within three business days of the delivery date. Failure to do so with constitutes an acceptance of the report as complete and without error.

If there are any **errors or serious concerns in regards to the data** and we are alerted within that three business day time frame your report will stay at highest priority and we will attempt to correct/address any issues as soon as possible.

If you request **modifications** to the report that are not a result of errors or data concerns we will review the availability of resources and alert you within one business day of when we can deliver the updated report.

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This policy was last updated on February 2, 2012 by Mark Wisniewski, Project Manager – Business and Systems Processes