# Event Record and Participant Tracking Guidelines

Events involving alumni, donors, prospects and key volunteer board leadership should be tracked using the Raiser's Edge Event Records. This document outlines how you go about getting an Event record created and invitation lists pulled, and includes an overview of the commonly used tabs of an Event record, the RSVP process, and event reporting methods. For more detail concerning the nuts and bolts of working with Event and Participant records, you may view Blackbaud's Event Management Guide.

## Getting an Event Record Created and Requesting the Invitation List

- Decide date, time, purpose, goal (monetary or not) and prices of the event.
- Contact Advancement Services to set up an Event record (unless you have been trained how to create these records). Advancement Services can pull the invitation list for your event as well. Be sure to provide at least 2 weeks lead time between your requesting this information and sending the invite/reminder.

## Event Record Tab Overview

**General Tab**
Basic event details including, date, time, place, description and links to seating wizard

**Prices**
Set up event registration fees and units of participation here

**Expenses**
May be used to track budget for the event (Alternatively could save a final budget summary on the Media tab.)

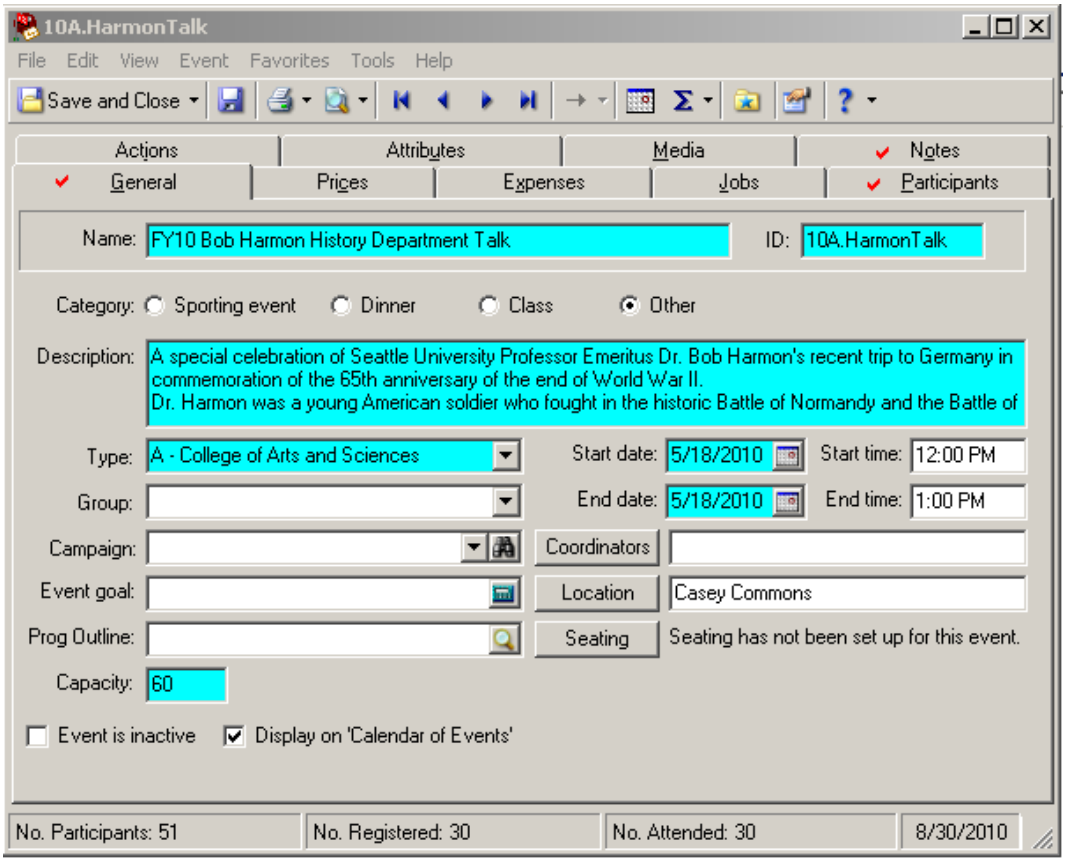
**Participants**
This is where registrations are entered, RSVPs evaluated, and this tab becomes the default screen each time you open the event record after it's been created and saved.

**Actions**
May be set up like an event planning check list. Most of us do these timelines/checklists outside of RE. Can save a final document into Media to keep track of the steps required to plan the event.

**Media**
Save final versions of event scripts, marketing materials, budget documents, briefing materials, set up documents, floor plans, correspondence here.

**Notes**
2 note types are helpful for future event planning - event evaluation and event catering feedback

Below is a shot of an Event record's General tab for a typical event:




## General Tab: Seating

- The seating wizard allows you to set up basic tables, and groups that you may place together at tables. (Typically used for the SU Gala, Alumni Awards and other functions where seating needs to be pre-assigned to accommodate all guests and their expectations.)

- Use groups to keep groups of registrants together – either those who tell you they are together, or internally you know they belong with a college or school, a specific award recipient or campus grouping. You do not have to make a group a perfect table number. Drag registrants from above (can select multiple people at once) and place them in a group below. You may change them around and keep creating groups.
- When you have your final floor plan and tables are numbered on your chart with appropriate groups assigned, drag groups over to the corresponding table number (more than one group may be used to fill in a table)
- Once all moves are final (or post-event) rename the table names in RE, and make sure you have a final record of seating.
- Seating reports – you may export queries with seating info, or use a seating report under reports.

More information about using the Seating functions on an Event record may be found in here (starting on page 43).

## Participant Tab and the RSVP Process

Participant Tab

- New Registrant (Required fields are highlighted in turquoise) –Most entries are registrants. If they are a guest of a registrant click on "Guest" first then follow the same instructions. If they are a sponsor click "Sponsor" first then fill in what is required.
    - Participant Biographical Info Box (pops up once you click new registrant)
        - Last Name – fill in, search for the person with the binoculars button:
            - If you find them hit open and most of the bio information will be filled in for you.
            - If you don't find them, add the information by tabbing through the screen
        - First Name – fill in if not already filled in for you.
        - Preferred Address Info – If a participant is also a constituent in RE this information will show up from their constituent record. If they are not a constituent you may store any contact information for the participant here.
        - SAVE AND CLOSE will bring you to the rest of the participant record.
    - General
        - Solicitor – Use only if it's important to track the development officer assigned to follow up with a participant for the event. It is manually added – the solicitor does not have to be the assigned prospect manager.
        - Participation – (Optional) Variety of affiliations are listed here – Alumni Relations tracks Student Alumni Ambassadors attending, we track various student attendees, scholarship recipients, SU board members, SU Staff, SU

Faculty for an easy way to see how they are affiliated with SU without having to export all constituency codes and other titles

- Status – Fill this in if tracking payments for the event – may just fill in "payment received" once you receive payment in the registration fee area. (For online registrants this status is not filled in – must be done manually. The registration fee comments does get filled in with NetCommunity for those who pay that way. Advancement Services does not manually edit this field after entering gift payments – event managers must monitor/update.)
- Response – (Optional – Can use Registration to equal Yes will attend. If you want to make it extra clear, you may choose to fill in this field: No – will not attend, Yes, or Tentative)
- Registration – Change to Registered, Fill in the date
    - Registered = Yes, attending
    - Not Registered = default value for anyone added, traditionally used here to show called in a "no" or regrets for the event so we know who the "no" people are
    - Do Not Register= not used or may be used for entering Sponsoring organizations – as the organization does not attend, but guests of that organization do.
- Seating – If the event requires assigned seats this is where the data may be stored. If a registrant has a specific seating note, put it in Group/Seating note- this field is unique to each participant. *Set up meeting with the Donor Relations team for tips on using seating wizard.
- More Info – This button has a dinner preference table that may be set up to track participants' meal selections.
- Awards – May populate this table if there are awards to be presented at the event to track the awards to be given to each participant.
- Tags/Cards – not generally used –it produces nametags that do not allow custom formatting. Do simple export to excel and complete your merge that way for name badges.
- Guests button – enter all guests for the initial registrant
    - New Guest - **Note, if you want to fill in more complete information for each guest than just name and registration, save the initial registrant first, then from the participants tab click on the left "guest" and new, follow the same format for filling in a registrant. There will be a required field in the lower right corner where you should type in the last name of the registrant for whom they are a guest and hit the search button, it will allow you to match them up and RE will finish filling in this field for you. They will be linked up and you will have more complete information for the guest.

        - Last Name – fill in, search RE, if match open, if not, fill in name, first name bio info that is known
        - Registration = "Registered" fill in Date
    - Sponsored by – if the registrant is linked to a sponsoring company the information appears here.
    - Participant is a coordinator – check if the person you are registering is the coordinator for the event.
    - ATTENDED – This box may be filled in one by one or you may update a group of records all at once. After an event, it is important to update the participants' records to show they attended. You may mark participants as attending in a batch mode by selecting Tools > Update Participants – pull in the participant query you have of participants registered for the event, follow the wizard to update all records' attended field then manually "uncheck" the ones who were no shows for the event.)
- Travel – Not generally used unless special travel information needs to be tracked for the registrants.
- Registration Fees – Fill this in for the primary person paying for the registration – we don't fill this in for guests.
    - Select appropriate Unit
    - Fill in number purchased
    - Fill in date and comments when the payment is received. Alumni Relations completes the date and puts visa, mc, ck with the check number or invoice number used to deposit the payment with the controller so we know the payments were deposited.
- Participation- Track details about specific roles such as speakers, vendors and volunteers.
- Donations – If gifts are linked to a person's participation in an event you will see this information here. (Advancement Services needs to have participants added to the event record first before they get the gifts to process – if they are registered with an outstanding sponsorship or registration fee it will prompt them to possibly link the gift they are processing to the appropriate event registration and they will link it here.)
- Attributes/Notes – If the participant registered online, there will be an Online Registrant? Yes/no line entered here. Record extra notes in the notes space – can export this with your rsvp lists to make sure you see them. Examples – needs special accommodations, dietary restrictions, special guest notes, etc
    - *Participant attributes may be useful with online registration. Should you have more interest in tracking specific responses from participants, email REHelp@seattleu.edu for a consultation.

- Attributes or notes may also be set up to help track auction item donations/additional payments made the night of the event so all event info is stored in RE not separate spreadsheets.

## Invitation Lists and Mailings

An invitation list can be created through a query and export. Be specific on the groups you would like invited to an event. Remember queries can only be based on data that is kept in Raiser's Edge. Current student information has to be obtained from the Registrar's Office for invitations. Submit an RE Information Request form to have Advancement Services assist you with pulling your mailing lists.

- Mailing list – an invitation query can be run through quick letters to produce mailing list for the mail house for large quantities of invitations.
- Email list – Run a query of those people with an email through quick letters to remove people with codes such as "no email except e-receipt". Contact Advancement Services if you would like an email blast invitation to go out for your event.
- Labels – use an invitation query and run it through Labels if you only need labels for an invitation mailing or a quick count for a future mailing.

You will want to request that an appeal is set up by Advancement Services for you to mark all records of constituents that were invited to your event or sent an email invite to your event. This is a helpful step so you may pull a list later of those invited to compare with those who have registered. Advancement services can help you set up the appropriate queries and/or exports – here's a quick summary:

- Set up a query of those constituents marked with the event appeal & the constituents without the event on their record. The results are people you need to follow up with.

# RSVP List Options

Create an RSVP Query – Type = Participant Query – Used with the exports outlined below for RSVP lists. Also used after the event to update who attended without having to open each registrant's record.

- Criteria=
  - Event Name (name of your event)
  - And Registration = "Registered" to give you a list of those planning to attend the event.
- Output=
  - Select a few fields you would like to see for each participant and the results may be exported into excel for a simple rsvp list that you may share with others.

** If you want everyone who's responded just use the event name as the criteria. Sort the results by registration so you can separate out the Not Registered people on the list to show they are those who have responded "no".

Advancement Services and Donor Relations can run a custom report of attendees in Crystal Reports. The output is printed on 8.5x11, portrait, alpha listing with a registrant's business info, Pres. Club, Alumni info, assigned solicitor.

Exports may be used to pull data pertaining to your event:

- For each export sample set up below you will need to select your event RSVP query and do a save as to make it your own event RSVP List with the date. (EX:Golden Reunion RSVPS as of 5/01/05.xls)
- Export samples are set up to export into EXCEL to a shared directory folder – make sure to change the folder to where on the shared directory you want it saved.
- Remember, think about who will be seeing these reports – please note that personal alumni data is confidential.
  - RSVP Basic:
    - Last Name
    - First Name
    - Full name
    - Participation
    - Host Name
    - Registration
    - Registration Date
    - Nick Name (use when producing name tags)
    - Constituent Code (picks top 1)
    - Business - Organization
    - Title

- Education – 3 for each person
    - Class of - Year 1
    - Type - SU School/College 1
    - Class of- Year 2
    - Type - SU School/College 2
    - Class of- Year 3
    - Type - SU School/College 3
- President's Club attribute (shows who's a $1000+ a year donor to SU)
- Assigned Solicitor relationship (shows if they have a prospect manager)
- Last gift this fiscal year (set up above $500 – you can change this criteria in Export to suit your needs)
- Last gift this fiscal year date
- To show both yes and no rsvps (or registered and non-registered participants)
    - Use the RSVP Basic, but you should use a query that just has criteria – Event name = "name of event" to get all registered and non-registered participants.
        - Sort this final export by registration, then by last name, first name so you can show yes answers first, then the nos

- RSVP Fees
    - All that is in RSVP Basic plus:
        - Status
        - Registration Fee Gift Amount
        - Registration Fee Date
        - Status
        - Unit
        - No. of Units
        - Comments
- RSVP Seating

## Tips for Formatting Exports in Excel

Once your data is exported to an Excel spreadsheet, use these parameters to help you fit the data on legal size pages in case they need to be printed:

- Page set up - Legal size, landscape,
- margins set to .25 left and right, 1 inch top, .75 bottom,
- Header – customized for the event,
- Sheet – show gridlines.
- Font sizes are 8.5 times except for the full name column which is usually 10 point.

- Sometimes columns have to overlap to fit, or you may choose to delete or hide non-essential information (we usually hide Last Name, First name – keep them only for sorting, but show the full name on the list). To make this process easier, you may want to record a macro with all of your changes, then run the macro each time you export the data for the event. (A macro will allow you to hit a button and have the page reformat itself quickly without you having to adjust every column, make every small change by hand.)