TRACKING EVENTS AND ENGAGEMENT WITH THE EVENTS MODULE IN RAISER'S EDGE

Part 1: Types of Events Defined

Primary Events

Primary events are large scale events we hold every year. They are primarily hosted by our office and are locked into our schedule and budget. All primary events have unique records in Raiser's Edge and are tracked by fiscal year. These events are:

- Alumni exhibitions
- Panel discussion events
- Regional events (LA, SF, Seoul, etc)
- Corporate Partners events and other fundraising events
- Alumni Society award panels

Small Events and Engagement

Small group events are small scale events we hold one-on-one with alumni or in small groups. They also include large and small scale events held by academic departments. Small group events are tracked within a parent record for all small group events within a fiscal year. These events are:

- Coffee/lunches/dinners
- Studio visits
- Social media events (Instagram takeovers, Friday Portfolios)
- Giveaways (museum passes, tours, etc)
- SVA Galleries at art fairs
- Department exhibitions
- Visual Arts Journal features

Career Development Events

Career Development events are events hosted by Career Development, that alumni are invited to (not all Career Development events are open to alumni). These events stand alone because there are so many events offered each semester. Career Development events are tracked within a parent record for each fiscal year.

Model Drawing

Model Drawing sessions are weekly free events (every Tuesday) hosted by Alumni Affairs and Residence Life, where alumni can spend three hours drawing a live model. This event stands alone because of its frequency. Model Drawing attendance is tracked within a parent record for each fiscal year.

Part 2: Creating Event Records for All Types of Events in Raisers Edge

For primary events, a new event record should be created for each event. For Small Group events and Career Development events, a new event record should be created for each fiscal year. For Model Drawing, a new event record should be created each semester.

1. Name the event using the following naming convention:

[FYYY] [EVENT NAME]
Example: FY16 Pre-Commencement Reception

2. Create an Event ID using the following naming convention:

[LAST TWO DIGITS OF YEAR] [FIRST 3-6 LETTERS OF THE EVENT NAME] *OR* [EVENT NAME ACRONYM]
Example: FY16PRECOM, FY16LAAR

3. Select the event Category. Most events will be "Other".

4. Provide a brief description of the event, including who was invited.

5. From the Type menu, choose the most appropriate event type.

6. Enter the start and end date of the event, the start and end time, and the location.

<u>Part 3: Adding Registrants for All Types of Events</u>

All individuals who RSVP for an event, as well as individuals who attend or otherwise participate in an event (as a panelist, staff coordinator or speaker) should be added as registrants in the Participants tab of the event record.

Note: Raiser's Edge seems to use the word "registrants" and "participants" interchangeably, so we will do so as well. There is no real distinction between a registrant and a participant for our purposes.

If the event is one that we've invited a select group of people to, such as Pre-Commencement or the Housing Benefit, all individuals who have been invited should be added as registrants. If the event is one that we invite all alumni to, or a large group of alumni to (such as all alumni based in a particular city or region) it is not necessary to add all alumni who were invited. In those cases, only the people who RSVP should be added as registrants.

1. **Populating the Participant Biographical Information Tab**
    a. When adding a new registrant, Raiser's Edge will first prompt you to select either Individual or Organization.
    b. IMPORTANT: Next, the Participant Biographical Information box opens. Click the binoculars button on the Last Name box, to search Raiser's Edge for the individual and link them to the appropriate record if that individual is in our system. If the individual is in our system, Raiser's Edge will automatically link and pull in the biographical information from that record to the new registrant record.

c. If the individual is not in Raiser's Edge, you must provide the first and last name, title and email address of the registrant, and any other information we have. Save and close out of the Participant Biographical Information box.

2. Populating the General Tab

a. From the Participation menu, select the appropriate participation type. Note: this may vary slightly for events where we have more than one part, such as a VIP reception and general reception.
b. On the Invite menu, regardless of whether all alumni or a select group of individual have been invited, and regardless of whether the individual has been directly invited by our office, always select Invited.
c. On the Registration menu, if adding registrants before anyone has started RSVP'ing, always selected Not Registered. When RSVP's come in, this menu is updated to Registered for each registrant who has RSVP'd that they will attend.
d. Mark the Participant Has Attended box after each event, to reflect the registrants who actually attended.
e. Participant Is a Coordinator is used to track which staff members are coordinating the event. Typically all Alumni Affairs staff should be marked "Participant is a coordinator" when they are being added as registrants to the event.

<u>Part 4: Using the Participant Attributes/Notes Tab to Track Small Group Events & Engagement, Career Development Events and Model Drawing</u>

The Attributes/Notes tab is crucial to our event and engagement tracking of Small Group Events, Career Development Events and Model Drawing. Since these events are all tracked under a parent event record, the attributes tab is where we will track the type of event, the department it was hosted by, its location and other pertinent details, and in the case of Model Drawing, attendance.

1. Small Group Events

a. On the Category menu, select Events and Engagement.

b. On the Description menu, select the type of event or engagement move it was (e.g. Mixer, Dinner, Lunch, Giveaway, Social Media, etc)

c. In the Comments field, provide a description of the event or engagement move. If it was an Alumni Affairs hosted event, only include the location (e.g. Los Angeles, NYC, New Orleans). If the event was hosted by a department other than Alumni Affairs, include the department name and the location. In addition, if the event took place in association with another event, such as the AIGA conference or SIGGRAPH, include that as well.

d. In the Date column, the date the event or engagement move took place.

2. Career Development Events

a. On the category menu, select Career Development Event.

b. On the Description menu, select the type of event it was.

c. In the Comments field, provide the name of the event.

d. Finally, provide the date the event took place.

3. Model Drawing

a. On the Category menu, select Model Drawing Attendance.

b. In the Description field, enter the number "1" if it is the first time the individual has attended. Increase that number by one each time the person attends (so if there is already a 1 in that field, increase it to 2. If there is already a 2, increase it to 3, and so on)

Part 5: Using the Participant Attributes/Notes Tab to Track Primary Events

The Attributes/Notes tab can be used to segment and code guest lists, especially if there are a variety of things you want to know about a guest. However, the Participation field on the General Tab is a more straightforward and intuitive way of segmenting guests. Also, the Participation field integrates well with the Raiser's Edge Event app, pulling the Participation type clearly into the guest details view.

Whether or not to use participant attributes with primary events is up to the lead coordinator of the event. Regardless of whether participant attributes are used, the Participation field should *always* be used.

Part 6: Adding Guests with Primary and Small Group Events

When registrants RSVP for themselves and a guest (or several), their guests should also be added as registrants.

1. Primary Events

a. In the Participants tab of the event record, select the registrant for whom a guest should be added.
b. Click on the "Guests" button on the bottom right.
c. A window will appear listing the guests the registrant has RSVP'd for, if there are any. Select "New Guest" to add a new guest.
d. Select Individual or Organization
e. In the New Guest information box that opens, click on the binoculars to search Raiser's Edge for the individual. If the guest cannot be linked to a record, provide their first and last names, as well as their title.
    i. If the first and last name is not known, the guest's last name should be the last name of the person they are a guest of. The guest's first name should be "Guest of [First Name of the Person They are a Guest Of], so their name appears on our guests list as "Styer, Guest of Kate."

f. Make sure the Create a Participant Record for this Guest box is checked. Raiser's Edge should automatically check this box.
g. On the Registration menu, select Registered.
h. When you are adding a new guest, unfortunately there is no way to select their Participation type or Invite. Therefore, after saving and closing the guest, return to the list of participants, find the guest that was added, and open their registrant record. From their record, select their Participation type and mark them as Invited.

Note: Attributes can be assigned to guests at the discretion of the lead event coordinator.

2. **Small Group Events**

Adding guests to Small Group events is the same as with primary events. However, Participant Attributes must be assigned to each guest, as they are for the alumni or individuals originally invited.

a. After following steps A through G above, return to the list of participants, find the guest that was added, and open the registrant record.
b. Select their Participant type and mark them as invited.
c. In the Attributes/Notes tab, assign the same attribute as was assigned to the individual they are a guest of.