



CAS Department Event Guidelines

From public lectures, auctions and galas to performances and small dinners, events help departments to increase visibility, engage the community, and keep donors and alumni involved with the latest developments. Identifying and reaching everyone who might be interested in a particular event has been made significantly easier by taking advantage of the resources that Advancement can provide, using data such as interest areas, prospect identification scores, etc. to craft invitation lists. Departments can maximize the impact of their events by inputting event invitation and attendance data. Using these resources to capture as much data on event participation as possible, departments can broaden their reach, deepen existing connections with donors, alumni, and friends across the university, and develop new relationships. CAS Advancement can also identify prospects and help departments to strategically target potential interest groups.

Three Options for Managing Event Information

Option 1: Coordinating with CAS Advancement

Departments can collaborate with CAS Advancement on events by working with their MarComm Specialists to create email and/or paper invitations and other collateral, their frontline fundraisers to manage event strategies and the CAS Advancement Services team to manage key data points for invitation lists and attendance.

Collaborating with CAS Advancement allows for a robust and targeted invitation list strategy (making sure to reach all the potential people who would have an interest in your event) by leveraging the data held in Advance. CAS Advancement can also make post-event analysis of attendees and recording engagement of key prospects that may have attended easier.

- Email donrsrvs@uw.edu when you have decided to hold an upcoming event. Include the name and date of the event as well as your department. Someone will contact you to help create the event and decide on how best to track attendance and invitations for the event.
- Contact the administrative assistant responsible for your division and your frontline fundraiser to develop an invitation strategy and to consult on a target audience:

Social Sciences	Natural Sciences	Arts/Humanities
Damian Peterson	Grace DeMun	Alexandra Colley
damianbp@uw.edu	gdemun@uw.edu	alexc09@uw.edu
206 616-1157	206 543-2235	206 685-6829

- If you would like help with creating invitations, posters, etc., please contact the MarComm specialist assigned to your division:

Social Sciences	Natural Sciences	Arts/Humanities
Colette Cosner	Whitney Sanchez	Max Weinstein-Bacal
cosnerc@uw.edu	wmsanch@uw.edu	mwbacal@uw.edu
206 616-2045	206 221-6593	206 616-4943

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- If you have decided to track event data using Excel, Eventbrite, or some other tool, email lists (invited, attended, RSVP, etc.) to donrsrvs@uw.edu in excel format including advance ID, first and last name, event name, and participation type (e.g. attended, invited, etc.) (Figure 1). This will allow us to update this information on Advance so that the data can be used to inform a person's engagement with UW and the Department, identify potential supporters and improve invitation strategies.
- Track attendance during the event.
- Email donrsrvs@uw.edu with a list of people who attended the event, were marked on the RSVP sign-up sheet or marked themselves as having attended. Please make sure to include first and last names and Advance ID's (Figure 1). If you did not track attendance, but did track RSVPs that is still useful, so please send for updating on Advance.

Option 2: Coordinating with Central Advancement

CAS Departments are able to manage event data on their own by working directly with Central Advancement Services to pull lists for invitations and create activity codes in Advance to mark invited and attended via spreadsheets maintained by the Department.

- Navigate to the Activity Code Request form from the main Advance intranet homepage <http://depts.washington.edu/uwadv/> (Figures 2 and 3).
- Enter the appropriate information for your event on the activity code form (Figure 4). The activity code creates a space where you can upload the attendance and invite data and allows you to search for the event on Advance. Having the invite and attendance data on Advance will influence scores on the attendees that measure connection to the university and their likelihood to give and participate in events in the future.
- Wait for an email from advhelp@depts.washington.edu and follow the link provided in the email to the secure Files Anywhere dropbox (Figure 5).
- Upload a list of invitees making sure to include first and last names and Advance ID's to the dropbox (Figure 6). Type "Invite list" into the "Add a message" field.
- Email advhelp@uw.edu to inform them that your invitation list has been uploaded.
- Track attendance during the event.
- Upload a list of people who attended the event and were marked on the RSVP sign-up sheet or marked themselves as having attended, making sure to include first and last names and Advance ID's to the Files Anywhere dropbox (Figure 6). Type "Attended list" into the "Add a message" field.
- Email advhelp@uw.edu to inform them that your attended list has been uploaded.
 - To Note: if Attendance wasn't captured but RSVPs were, upload the RSVP to the dropbox and type "RSVP'd" into the "Add a message" field and email advhelp@uw.edu to inform them that your RSVP list has been uploaded.

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Option 3: Using Cvent

- To Note: Using Cvent requires that the person planning the event take the Cvent training offered by Central Advancement Services and Training. Please consult the training calendar for upcoming training sessions:
<http://depts.washington.edu/uwadv/data-technology-resources/advancement-training-support/ats-training-calendar-and-registration/>

Departments can use Cvent to manage their event registration and attendance via an online website. If Cvent is used, there **would not** be a need to create an activity code or update registration or attendance information separately. These steps will be handled automatically by Central Advancement Services via the Cvent tool. Besides automating information uploads, Cvent is also very useful in that it allows a user to easily build event websites, registration pages, and invitation and confirmation emails. Departments are encouraged to use Cvent and CAS Advancement can provide assistance even if the department does not have a staff member who has taken the Cvent training.

Suggestions for Audience Criteria

If a Department is managing their invitation list criteria with the help of Central Advancement, please consider the inclusion of the following audience segments:

- Prospects (active and deferred) for your Unit or specifically your Department – if this makes your list too large, you could remove people based on their active or deferred status or their UW Engagement Score (lower engagement means they haven't been recorded as attending events in the past)
- Henry Suzzallo Society Members (supports who have left UW in their will) who are unit or department Alums or who have indicated their estate gift will go to the College of Arts & Sciences
- Donors of a certain dollar amount to your department from the last few years – this would depend on how big your event is/how many people you would like to invite
- Excluding donors from Regions outside of Western Washington, unless it is an event that you feel would draw people from further away.

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Screenshots

Figure 1 Format for all Excel Spreadsheets for Uploading Event Data to Advance

	A	B	C	D	E	F	G	H	I	J
1	Date of Event	1/2/2013								
2	Advance ID	First Name	Last Name	Activity Name	Participation Type					
3	156841	Anna	Karenina	Russian Literature Panel	Attended					
4	2138	Rodion	Raskolnikov	Russian Literature Panel	Attended					
5	26483	Pierre	Bezukhov	Russian Literature Panel	Attended					
6	654123	Eugene	Onegin	Russian Literature Panel	Attended					
7	89735	Mikhail	Berlioz	Russian Literature Panel	Attended					
8	14556	Porfiry	Petrovich	Russian Literature Panel	Attended					
9										
10										

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Figure 2 Finding Forms in the dropdown list

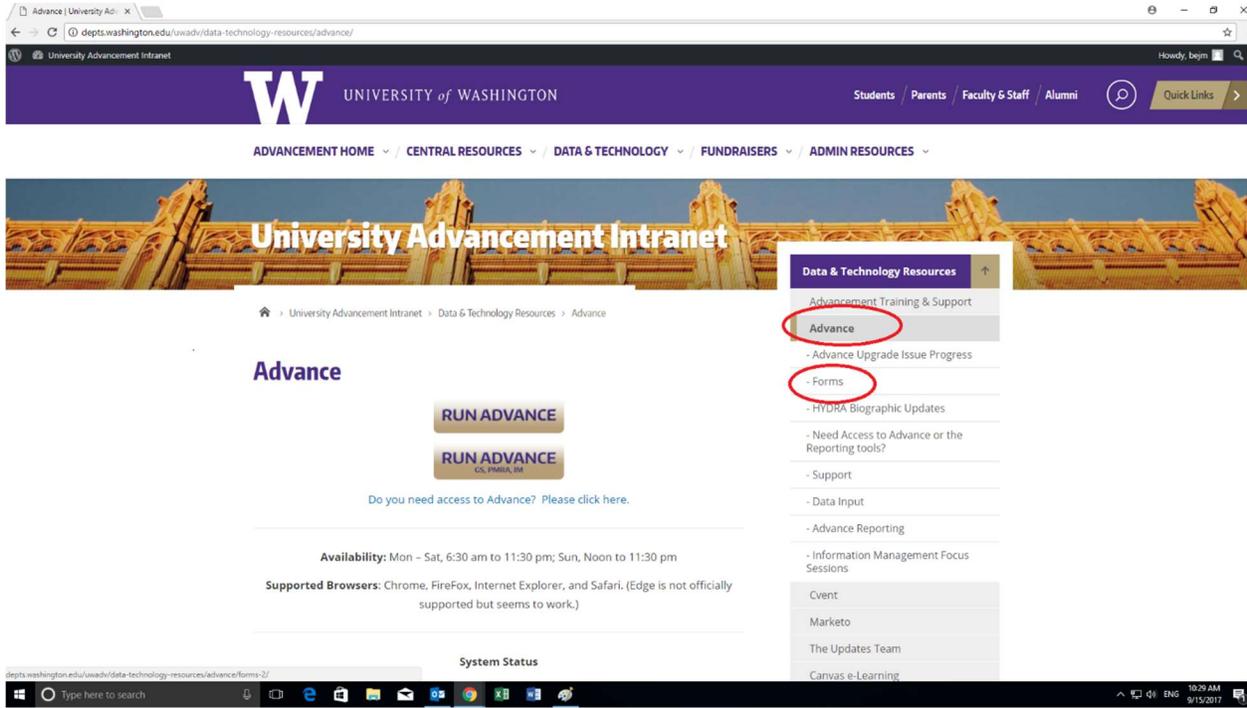
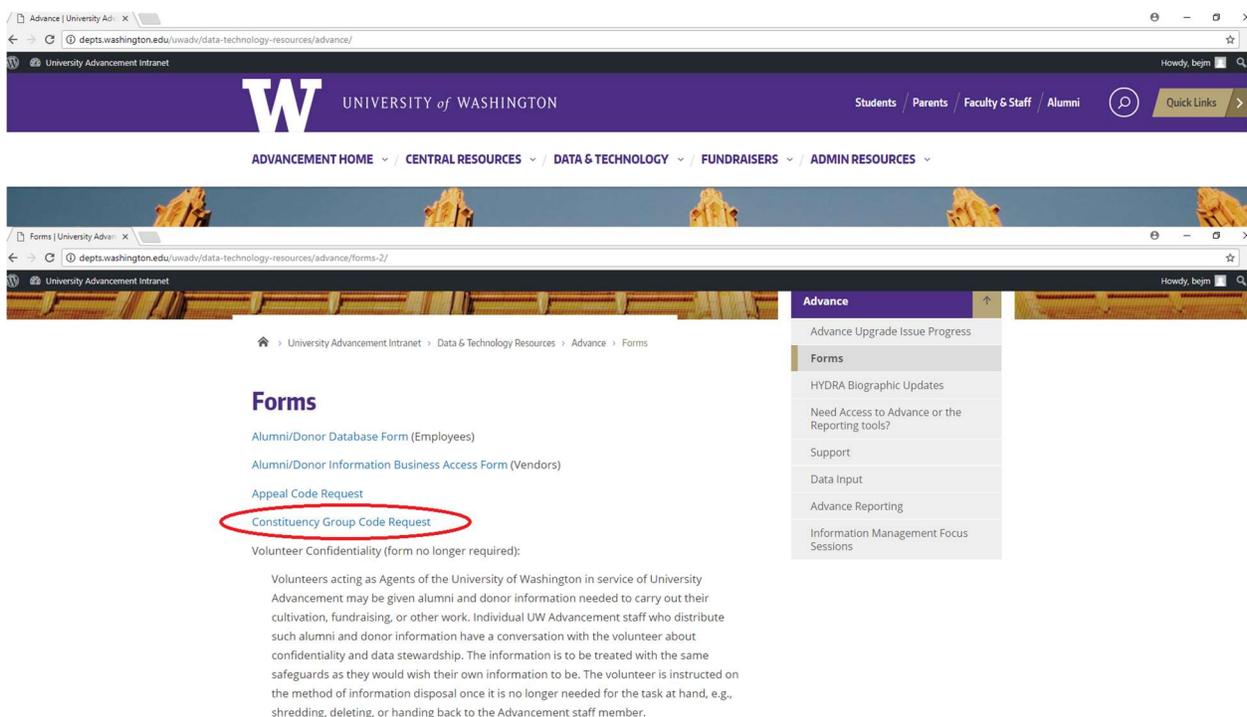


Figure 3 Step 1: Event Activity Code (Constituency Code) Request



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Figure 4 Step 2: Event Activity Code Request

Home > University Advancement Intranet > Data & Technology Resources > Advance > Support > Constituency Groups > Constituency Group Code Request

Constituency Group Code Request

Seven types of codes in Advance are referred to as Constituency Groups. They allow us to group entities together based on having something in common related to, for example, an event, contact preferences, or committee membership. Sport and Student Activity codes indicate UW student participation while attending.

If you wish to track progress of an Annual Giving Campaign, please use the Appeal Code request instead. [Request one here.](#)

Constituency Group Information

Group Type: (required)

Activity (Event) Awards & Honors Committee Interest (Hobby) Mailing List Student Activity

If Activity code, Date of Event:

Date of event

Sponsoring Unit(s): (required)

Help us make sure the right group(s) get credit for tracking this data: please tell us which department(s) or unit(s) are involved with this project. Please be as specific as you can.

Your department

Please check any of the following that apply:

Yes, the UWAA is partnering with us on registration or other aspects of our event.

Yes, the UWAA is partnering with us on registration or other aspects of our event.

My data is ready to upload now.

My data is not ready yet.

Date Needed: (required)

Give at least 3 business days

Preferred Code [in most cases, 5 characters]:

Typically 3 letters and year eg CDC15

Short Description [Up to 30 characters]: (required)

Name of Event

Full Description [Up to 60 characters]:

How will this code be applied to Advance entities? (required) **Select if not using Cvent**

I have a list of Advance Entity ID's to upload. (Upload link will be emailed to you.)

Someone in my unit will manually apply the code in Advance.

I am not sure - please contact me to consult on this request.

Load from Cvent event invitations/registrations. **Select if using Cvent**

Load directly from Ad Hoc Report from Reporting Group.

If you'd like us to load from the Report output, what is the Job Number of your report request?:

How will this group be maintained in the future? (required)

This is a static list whose membership will not change over time.

Someone in my unit will manually apply or delete codes in Advance.

We will make requests through updates@uw.edu as needed.

Additional Comments?

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Figure 5 Activity Code Request - Example Email from advhelp

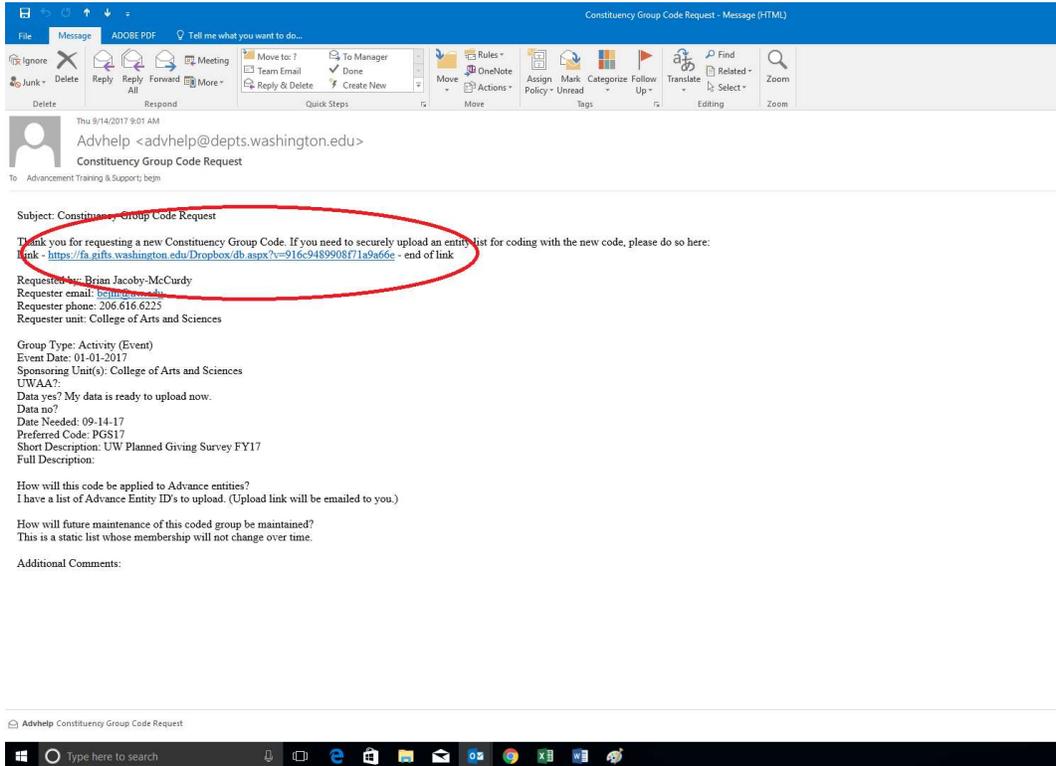


Figure 6 Step 3: Event Activity - Uploading Spreadsheet Files to Dropbox

