Events Policy: Use Event Records and NetCommunity Online Registration

To better track University Advancement efforts, events involving alumni, donors, or prospective donors to Seattle University should be recorded in the Alumni and Donor database. This policy outlines how and when Event records are added to the database, conditions that must be met before using NetCommunity online registration, and the roles and responsibilities for each stakeholder department.

When Should Event Records and NetCommunity Online Registration Be Used?

Event Records:
When requested, Advancement Services staff will determine if an Event record should be created using the following criteria:

- The event has an alumni or donor focus.
- The majority of anticipated attendees are constituents in the Alumni and Donor database.
- Staff responsible for managing the event have been identified and have the resources to track event participation in the database. If resources are not available for tracking the event from start to finish, the Event record will not be created. In these circumstances, Advancement Services staff will provide an alternative tracking method such as applying Appeals.

The size of the event should warrant the effort required to track the event with its own record. This is at the discretion of the event manager/tracker.

NetCommunity Online Registration:
When requested, Advancement Services staff will determine if NetCommunity online event registration should be employed using the following criteria:

- The event should meet all the criteria for Event record creation (see above).
- The event is being sponsored and requested by University Advancement staff.
- There must be a registration fee associated with the event. This fee amount must be entirely for registration. There cannot be any donation portion included in the fee. If donations are to be collected, they cannot be collected through the NetCommunity registration process.
- Advancement Services has the resources to handle the expected number of registrants for the requested event and other online registration events running concurrently.

Events with no registration fees may be handled by CMS web forms. Third party online registration vendor could also be used for events that have fees. At this time, there is no campus wide solution available.

Events that have an alumni and donor focus, but do not meet the NetCommunity online registration criteria should still be tracked in the Alumni and Donor database. CMS web forms and most 3rd party vendors may supply registration reports that can be imported into our database. Contact Advancement Services at REHelp@seattleu.edu to discuss this possibility.

Roles and Responsibilities:

The Event Manager/Tracker: Designated events tracking staff person(s) for a department, school or college.

- Requests the creation of Event records and online registration pages.
- Communicates with various stakeholders concerning their event (Special Events staff for advice, Alumni Relations if the event has an alumni focus, MARCOM for design support, etc.).
- Attends RE Event Tracking trainings if needed.
- Enters Participants into the Alumni and Donor database as rsvps are received and links Participant records to Constituent records.
- Links imported Participant records to Constituent records.
- Tracks other event management details in the RE event record including recording expenses, loading agendas as media, and recording event location.
- Troubleshoots and answers questions from individuals inquiring about the event. Informs AS Staff if software issues arise.
- Runs RSVP queries and exports as needed. May request these services from AS using the Data Request form.

Advancement Services: Technical Support staff and Gift Processors

- Fields requests for Event records and online registration pages and determines the appropriateness of their use. These requests require completed RE Data Request forms.
- Creates Raiser's Edge Event records and online registration pages.
- Provides Event module trainings that cover how to use Raiser's Edge to track event participation. Emphasis will be placed on the impact of not following through on event tracking. These trainings can be one-on-one or in a classroom setting.
- Review newly created Events to ensure procedures are followed (as they pertain to new record set up).
- Process all incoming online event registrations generated through NetCommunity within one full business day.
- Imports rsvp lists pulled from other event registration systems into Alumni and Donor database Event records.

- Troubleshoot software issues and provide queries/lists/reports based on event participation if needed.

Special Events Staff

- Answers questions and provides tips for those that seek event management advice.
- Create and manage RE Event records for those events they are responsible for.

Any questions about this policy should be directed to Advancement Services by emailing REHelp@seattleu.edu.