Policies and Procedures

Events

# Event Participant Records

On the Input General Participant Information screen, you enter general information about the participant in regards to the selected event. You can specify the participant’s participation role, invitation and registration status, and more. The information you enter on this screen appears on the participant record.

# Policy

## **Solicitor:**

* + 1. In the solicitor field, link the participant record to either the
       1. Primary Solicitor on the constituent’s record
       2. The staff member that will be cultivating them at the event.
    2. It is a ‘search’ field, so you must link the record to a constituent record.

## Event Role:

* + 1. In the Event Role field, select the role that the participant will have that evening. The options are:
       1. **Table Host**: For anyone who is hosting a table at the event, whether sponsor, staff, board, or other.
       2. **Attendee:** For anyone who is simply attending the event at the basic level.
       3. **Volunteer/Event Support:** For anyone who will take part in helping the event run smoothly, from set-up or greeting, to supporting the speaker.
       4. **Speaker:** For anyone who will go up on stage to give a speech.

## Registration Status

* + 1. In the registration status field, enter the information about where in the registration process the participant is. This is where to mark what information is still needed before their registration is complete. Options are:
       1. **Complete:** The goal is for all participants to have complete registration pages
       2. **Confirm Attendance:** The participant has informally said they will attend, but has not confirmed or officially registered.
       3. **Pending Attendance:** We are waiting on a decision around whether the participant will be attending or not.
       4. **Guest Name/s Needed:** We have confirmed the guest, but they have one or more guests that we need information for.
       5. **No Payment:** Attendance is confirmed, but we have not yet received payment for the tickets.
       6. **Seating Preference Needed:** No seating group or table host was specified – we need to contact to find out where they would like to sit.
       7. **Accommodation Info Needed:** They marked that they have either accessibility requirements, food restrictions or some other necessary accommodation. We need to contact them to get further information.
       8. **Needs Contact Info:** We need an email or phone number for the contact.

## Invite?

* + 1. The invite field is used to track if they were *personally* invited to the event.
       1. **Invited:** a staff or board member reached out to the person directly to invite them to the event.
       2. **Not invited:** no personal invitation was received – may or may not have received the bulk invite mailing or the email invitation, but did not have personal follow-up.
       3. **Do not invite:** Not frequently used. For people who have specifically requested to not be invited to the event, or who are a contact for a sponsor or other partner organization.
    2. You can check this by accessing the ‘actions’ tab on the constituent record.

## Response

* + 1. In the response field, choose the table entry that best fits their response, if they were personally invited to the event:
       1. **Accepted:** They accepted the invitation and will be attending the event.
       2. **Pending:** They are ‘looking at their calendar’ or otherwise deciding if they can or will attend the event.
       3. **Cancellation:** They were previously marked as attending, but have since needed to cancel
       4. **Transfer:** They are attending in someone else’s place.
          1. Mark the other record as ‘cancellation’, put a note on both participant records
       5. **Decline – General:** Cannot attend for unknown reasons, or reasons not fitting into the other decline types
       6. **Decline – Out of town:** Cannot attend because they are travelling.
       7. **Decline – Dislike Events:** Will not be attending based on a preference to not attend events.

## Registration

* + 1. Registration gives you three options:
       1. **Registered**: Anyone who has gone through the online registration process, or has had staff register them through Raiser’s Edge
       2. **Not Registered**: Anyone who has not confirmed they will be attending the event.
          1. Cancellations will be updated to say ‘Not Registered’
       3. **Do Not Register**: Not frequently used. Mainly for sponsors and other organizational partners & contacts.

## Seating Group

* + 1. The seating group field is where you put the table the participant will be sitting at.
       1. If they will be sitting with a **table host**, put the table host’s name (First and Last) in the seating group field.
       2. If they are sitting at a **sponsor table**, put the name of the sponsoring company in the field.
       3. If they are coming separate from a table host or sponsor, put them in the seating group of ‘Individual’

## Seating Notes

* + 1. In group/seating notes, put the names of everyone they would like to sit with, as well as any other accessibility notes or otherwise.

## Sponsored by

* + 1. If the participant is coming via a sponsor, link them to the sponsor participant record using the ‘sponsored by’ field.

## Other pieces to consider

* + 1. **For the luncheon**: please select More Info… to select a dinner preference & quantity
    2. **For all events:** select Tags/Cards to select what they would like to see on their name tag.
    3. **If they are bringing a guest:** select Guests to add the guests
       1. You will need to open the guest record separately to fill in the rest of their participant record.

# Procedure

* 1. <<forthcoming>>