PROJECT REQUEST

*06/04/15*

## Requesting the Appropriate WFAA Service

The services provided by WFAA support distinct advancement and stewardship purposes. Because some services overlap (e.g. generating a list of alumni or creating event invitations for those on the list), requesting the appropriate service saves time and effort.

### Marketing, Events, and Registration Services

WFAA’s Marketing team provides marketing assistance (e.g. brainstorming, creating of web or print content, printing, and mailing), video development and production, and other marketing services.

WFAA’s Alumni & Donor Engagement team provides event and registration assistance (e.g. planning, online registration, payment collection and other services).

# Project, Event, and Registration Requests

WFAA and UW-Madison personnel can request assistance from WFAA’s Marketing and Alumni & Donor Engagement teams. To request assistance, you are required to submit an online Project Request form. This form must be submitted by the program owner (or someone on behalf of the program owner).

The form’s information will engage the appropriate resources at the planning phase of the project.

## Request Process

When a request is submitted, it will be reviewed by WFAA’s Project and Resource Management team. Depending on the services requested, this team will forward the request to the Marketing, Events, and/or Registration teams.

For many project requests, the Marketing team will contact the requester to arrange a meeting. On the WFAA side, the meeting should include the resources required for the project (e.g. Marketing Managers, Marketing Coordinators, Registration Coordinators, Event Managers, Copywriter, Designer, and/or Digital Representative). On the requester side, the meeting should include the requester and key stakeholders.

For some project requests, the requester may be contacted directly by Event Managers or Registration Coordinators.

Important: If you plan to do your own marketing but need an email, mail, or phone list, you should submit a [List & Report request.](http://about.uwadvancement.org/marketing/list-report-request/) If WFAA is handling your marketing project, select List Request under services on the Project form and the Marketing team will submit the List Request for the project.

## Preparing to Submit a Request

Prior to submitting a request for marketing, event and registration services, the program owner should:

* Be aware of project timelines (see the timelines posted on Advancement Resources). Use this information to provide the WFAA teams adequate time to fulfill the request.
* Ascertain which marketing services are necessary for the project:
* Marketing strategy (consultation, planning)
* Program content (topics, speakers, activities)
* Copywriting/editing/proofreading
* Feature/news writing (news release, story)
* Graphic design (layout, images)
* Print production (brochures, flyers, invitations, reprints)
* Email development and distribution
* Mail/other distribution
* Web content
* Social media
* Video (development, production)
* Photography
* List Request (address, email, phone)
* Phone/Telefund
* None of the above – Add to [Advancement Calendar](http://about.uwadvancement.org/events/) only
* Only select List Request when communications will be managed by WFAA Marketing Division. All other list needs should be submitted via the [List & Report request.](http://about.uwadvancement.org/marketing/list-report-request/)
* Identify the WFAA fund name and number to be used for revenue and expenses for your request.
* Most of the time the revenue and expense funds will be the same, but there are circumstances under which they will be different. For example, a project’s printing expenses may be paid from one fund while revenue received will be deposited into another fund.

## Project, Event, and Registration Request Form Fields

Note that some fields display only when necessary, depending upon your form selections.

For questions about the Project Request form or an existing request, please email Project & Resource Management team at prm@uwadvancement.org

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| **Project Field Name** | **Description/Notes** |
| Name | Name of requester |
| Email | Email of requester |
| Phone | Phone number of requester in a 10 digit format (XXX‑XXX‑XXXX) |
| Are you an employee of the Wisconsin Foundation and Alumni Association? | Provides a ***Yes/No*** selection |
| Campus Unit you are representing | Select from a list of main campus units, including UWF/WAA. An ***Other*** option is provided for units not on the list |
| WFAA Division  *Field appears only if you have indicated you are an employee of* **WFAA***.* | Select from a list of WFAA divisions |
| If *Other*, please indicate your campus unit  *Field appears only if you have specified***Other** *as the campus unit you are representing.* | Supply the name of your campus unit if *Other* is selected under *Campus Unit you are representing* |
| Department/Program Area | Enter the department, center, or program you are representing. |

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| Project Title | Provide a title that includes the campus unit or department/program.  For event only requests, the Project Title and Event Name can be the same. |
| Does this project include an Event? | Provides a Yes/No selection. |
| **These fields appear only if you’ve indicated that your project includes an Event.** | |
| What event services do you need? (Check all that apply)  Key milestones will inform the project schedule and allocation of resources. Please see the Project Timelines. | Registration: Check if your event requires registration. If checked, additional fields will appear asking if you need an online registration site.  Event planning: Check if you would like event assistance (e.g. catering, room reservations).  Consultation: Check if you would like program planning or constituent relations assistance from WFAA’s Alumni Relations & Engagement team.  Add to Advancement Calendar: This is checked by default, indicating that your event will be added to the online [Advancement Calendar](http://about.uwadvancement.org/events/). The calendar will contain a link to a page describing your event. Please uncheck if you do not want your event published. |
| Event Type  *Field appears only if you select* **Event Planning***.* | Select all that apply. This will help determine the scope and services of your event. |
| Do you need online registration managed by WFAA?  *Field appears only if you have indicated that your event requires registration.* | Indicate *Yes* if you need online registration for the event. |
| Event Name | This is the event title that will be published on the [Advancement Calendar](http://about.uwadvancement.org/events/) (if applicable). The title should include the name of the campus unit, department and/or program. |
| ABE Event Lookup ID(s) | When an event is created in ABE, a unique lookup ID is automatically assigned. If your event has already been created in ABE, please include the Event Lookup ID. Otherwise, leave this blank. |
| Is there a registration fee for this event? | Indicate *Yes* if there are any fees. |
| Registration Fee, if known: | Dollar amount or estimate |
| Do you know the event date? | Provides a *Yes/No* selection |
| Event Dates | Start and end dates. Start date is required. |
| Event Time | Start and end times. The start time is desired for event configuration, but not required. |
| Ballpark Event Date | A general date range such as *Fall 2016* or *Prior to Homecoming* |
| Event Category | Select from the supplied list.  Descriptions of the available options are listed in **Appendix A** at the end of this document. |
| Event City | General region or area of the event (e.g. *Madison* if the event is actually in Middleton; *Milwaukee* if the event is actually in Shorewood) |
| Venue Name and Venue Address | Name and address of the location for the event.  The Venue Name is where you can supply information like *Victory Mansions* or *Winston Smith Auditorium.* |
| What marketing services do you need? (Check all that apply) | Check the services you expect to use. Follow‑up discussions and planning meetings may modify your set of services.  Marketing strategy (consultation, planning)  Program content (topics, speakers, activities)  Copywriting/editing/proofreading  Feature/news writing (news release, story)  Graphic design (layout, images)  Print production (brochures, flyers, invitations, reprints)  Email development and distribution  Web content  Social media  Video (development, production)  Photography  Mail/other distribution  List Request (address, email, phone)  Phone/Telefund  None of the above (select this if you only want an event added to the [Advancement Calendar](http://about.uwadvancement.org/events/)) |
| Will you solicit for a gift/donation in this project/event? | Gifts/donations are charitable gifts. This includes “hard” and “soft” asks/solicitations or post-event solicitations. |
| Tell us more about your project. | Describe the projectand the services you need.  Please be thorough and expand upon the services you checked above. Provide key information to help the team understand the scope and needs of your project. |
| Additional Documentation | If available, supply documents to assist in the planning of your project (e.g. historical information, content, contracts, logos).  This not required or can be provided at a later date. |
| Goal and Desired Outcomes | Outline quantitative success measures (e.g. attendance, revenue, interactions, donations, stewardship).  Quantitative means something that can be measured. |
| Audience description | High level description of audience (e.g. donors, alumni, regions, ABE attributes)  This will not replace a [List & Report Request](http://about.uwadvancement.org/marketing/list-report-request/) , but it will help to determine parameters and populations. |
| What is the primary strategy for this initiative? | Engagement: Growing positive connections and strengthening relationships with the University, Schools, Colleges, or Departments.  Development: Raising money to support the advancement mission of the University, Schools, Colleges, or Departments. Goal is donations.  Revenue: Generating dollars to support WFAA operations. Goal is sales.  Awareness: Increasing knowledge or understanding about a particular program or entity. |
| Are there any secondary strategies? Please check all that apply. | If your project has a secondary strategy, indicate it by checking all appropriate boxes. |
| Manager who approved this project | Enter the name of the manager or supervisor who approved this project. |
| Budget | Can be an estimate. |
| WFAA Revenue Fund Name | The name of the WFAA fund where revenue collected by the project will be deposited. Please do not enter campus funds.  If no revenue will be collected, enter *Not Applicable*. |
| WFAA Revenue Fund Number | The name of the WFAA fund where revenue collected by the project will be deposited. Please do not enter campus funds.  If no revenue will be collected, enter *Not Applicable*. |
| WFAA Expense Fund Name | The name of the WFAA fund used to cover expenses related to the project. Please do not enter campus funds.  If no expenses will be collected, enter *Not Applicable*. |
| WFAA Expense Fund Number | The number of the WFAA fund used to cover expenses related to the project. Please do not enter campus funds.  If no expenses will be collected, enter *Not Applicable*. |
| Timing of project | The general date range for the completion of the project (e.g. *Fall 2016* or *Prior to Homecoming*)  Key milestones will inform the project schedule and allocation of resources. Please see the [Project Timelines.](https://connect.supportuw.org/content/12347) |

# Appendix A: Event Category Definitions

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| |  |  | | --- | --- | | **Category** | **Description** | | **Advocacy** | Educate/inform/activate on key policy and higher education issues | | **Athletics** | Athletic tickets, pre- and post-game events, athletic tours | | **Awards/Recognitions/Scholarships** | Celebrate, acknowledge individuals (e.g. Alumni Awards, scholarship receptions) | | **Board/Committee Meeting** | BOV, WFAA Board, President’s Advisory Council, committee meetings/events | | **Career/Networking** | Professional connections, career resources, mentoring | | **Comprehensive Campaign** | Pre-campaign and campaign events, consultation dinners | | **Donor/Member Stewardship** | Recognize groups of constituents through special opportunities (e.g. BHS Luncheon, Wisconsin Club, WAA member events) | | **Cultivation/Fundraising** | Communicate about a specific gift opportunity and/or make an ask/solicitation that is not related to the comprehensive campaign | | **Enrichment** | Share UW expertise and content with alumni and donors (e.g. Global Hot Spots, Made in Wisconsin, Alumni Learning) | | **Reunions** | Class or affinity group reunions (e.g. *Daily Cardinal,* All Nursing Alumni Reunion, 50th Class Year) | | **Social/Celebration** | Mark an occasion not in other categories (e.g. Building groundbreaking or Grand Openings, departmental anniversary, gatherings) | | **UWF/WAA Corporate** | Signature alumni relations programs, staff meetings, celebrations | |