

# Major Events Committee Overview

## Invitation List Vetting Process

**Committee Charge:** In order to ensure invitation lists for major events (Chancellor’s level / Campaign / Founders Day / etc.) are appropriately drafted and vetted, it is important for the various SMEs associated with Donor Relations, Donor Stewardship, Research, AS-BI, DRS and other areas to steward Advancement Operations and Campaign efforts.

**Definition:**

*An Advancement Major Event* is defined as any significant Campaign event planned or facilitated by Advancement with data provided by AOC – examples include Campaign events run by Advancement or SEP with invitation lists from AOC. Typically, these events are inviting top tier donors, campus leadership, board members, etc.

The Major Events Committee is designed to ensure SME’s critical to major events are involved, data is up to date and current, criteria are completely understood and decisions which may affect results are vetted.

The Major Event Committee is comprised of:

<b><u>Organization</u></b>	<b><u>Representative</u></b>
<b>Chair:</b>	<b>Robyn Isbell</b>
<b>Donor Relations:</b>	<b>Christy Bliss</b>
<b>Donor Stewardship:</b>	<b>Corinne Cramer</b>
<b>Prospect Research:</b>	<b>Andillon Hackney</b>
<b>DRS:</b>	<b>Olivia Downey</b>
<b>AS-BI:</b>	<b>Diane Heath</b>
<b>AS-BI:</b>	<b>Jonathan Udoff</b>
<b>AOC Operations:</b>	<b>Pati VanSise</b>
<b>SEP:</b>	<b>Michelle Corcoran</b>

To ensure critical deadlines are met, MEC must have at least 6 weeks’ notice before the first mailing is scheduled to be sent. If this timeline is not adhered to MEC will discuss and determine if it can accommodate the request. It is highly recommended that the MEC Chair be included in all preliminary discussions as early as possible.

## **Roles**

### **Committee**

1. Create policies, procedures and processes for the requesting and delivery of event invitation lists for specifically identified campaign events.
2. Meet with the client to review the request and ensure their needs and requirements are understood, as well as to ensure UCSD protocols and policies are being implemented.
3. Facilitate upload of invitation lists to ESP and provided list to client with any additional data required by client for mail house, C-Vent, nametags, place cards, etc..

## **Responsibilities**

### **Committee**

1. Develop and communicate data standards and protocols.
  - Minimum Data Requirements for ESP Events
  - Standard Names for groups and selection definitions
  - Defaults for name formats, salutations, solicit codes (do-nots).
2. Create and send standard communications to advise business owners of boards and committees of requests for lists.
3. Update event in ESP with category designated as "MEC Donor Event"
4. Create and send summary emails after each client meeting
5. Request and deliver data refresh before each mailing.

### **Committee Chair**

1. Single point of communication between committee and client.
2. Schedule meeting with client and committee members.
3. Compile all stakeholder feedback from data request form into one criteria form as statement of work; create criteria spreadsheet for ASBI.
4. Serve as the liaison and act as point of contact for client and work directly with them to ensure lists are appropriately vetted and deadlines are met for submission to committee.

### **Client**

1. Contact Committee Chair to schedule meeting with MEC no less than 6 weeks prior to planned delivery date to mail house.
2. Return completed Request Form to committee chair minimum of 3 days before meeting with committee.
3. Enter event in ESP Event Calendar using Minimum Data Requirements.
4. Attend all scheduled meetings with committee.
5. Work with committee Liaison to accomplish vetting of lists and obtain all required approvals within timeframes set by committee.
6. Provide any external lists or names that may not be in CRM. These lists must contain Lookup IDs
7. Track changes in list provided and include Lookup IDs
8. Meet established deadlines to provide committee adequate time to produce deliverables on schedule. Failure to meet established deadlines will result in a delay of deliverables.

## **Timelines**

Six weeks before mail house requires list - client contacts MEC Chair to schedule meeting with MEC.  
Chair sends to client:

- Major Events Data Process Request Form
- Major Events Frequently Requested Lists and Definitions
- Major Events Committee Overview

Minimum 4 weeks before planned submission date to mail house - Meeting w/client  
At this meeting:

- Determine requirements
  - Audience
  - Components (invitations, nametags, etc.)
  - Special protocols
  - Other lists that need to be incorporated into master
- Communicate timelines and other information
  - Roles and Responsibilities
  - Data Standards
    - Name Formats
    - Do nots

1 Week after initial meeting

- List is sent to client - Client to vet and circulate for all required approvals.

2 Weeks after initial meeting

- Client returns vetted list with corrections, additions, edits

3 Weeks after initial meeting –

- Delivery meeting is set up with client and committee to review final list
- Updated list sent to client and uploaded to ESP by MEC

Refresh -Depending on the date of the most recent list pull, the data will be refreshed 7 days before sending to the mail house.

**Example** – (minimum time frames)

Nov 10, 2017 – Event Date

Jul 10, 2017 –Save the Date mailing

Oct 2, 2017 – Invitation mailing

June 1 – Client to contact MEC chair

MEC chair schedules committee meeting and sends Request form to client

Jun 8 – Committee meets with client

Jun 15 – List sent to client. Client vets and obtains all approvals

Jun 22 – Client returns corrected and approved list.

Jun 26 – corrected list is refreshed, submitted for upload to CRM and sent to client.

Sep 18 – Client request list refresh for invitation mailing.