

PROJECT REQUEST

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 & Communications Division 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, Communications, 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, Production 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](#). 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.
- Select which marketing services are necessary for the project:
 - Marketing strategy (consultation, planning)
 - Copywriting/editing/proofreading
 - Feature/news writing (news release, story)
 - Graphic design (layout, images)
 - Print production (brochures, flyers, invitations)
 - Email development and distribution
 - Web content
 - Social media
 - Video (development, production)
 - Mail/other distribution
 - Photography
 - List Request (address, email, phone)
 - Phone/Badger Call
 - None of the above – or add to [Advancement Calendar](#) only (if applicable)
- 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](#).
- 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. Fields with asterisks are mandatory.

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

Project Field Name	Description/Notes
Name*	Name of requester
Email*	Email of requester. Copy of the request will be sent to the email provided.
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
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* <i>Field appears only if you have indicated you are an employee of WFAA.</i>	Select from a list of WFAA divisions
If <i>Other</i> , please indicate your campus unit* <i>Field appears only if you have specified Other as the campus unit you are representing.</i>	Supply the name of your campus unit if <i>Other</i> is selected under <i>Unit you are representing</i>
Department/Program Area	Enter the department, center, or program you are representing.

Select how you will pay for any expenses incurred:*	Indicate how expense tied to this request will be paid for, either via WFAA Internal Operational Funds , WFAA Gift/Donor Funds or None of the above if no expenses will be incurred.
Manager/Authority who approved this project*	This person must have the authority to approve the use of monies from listed fund(s).
Manager/Authority's Email*	Copy of the project request will be sent to the email provided.
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 <i>Not Applicable</i> .
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 <i>Not Applicable</i> .
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 <i>Not Applicable</i> .
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 <i>Not Applicable</i> .
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.

<p>What event services do you need? (Check all that apply)</p> <p>Key milestones will inform the project schedule and allocation of resources. Please see the Project Timelines.</p>	<p>Please review the Event & Registration guidelines</p> <p>You can select no services. By default, almost all events are built in ABE.</p> <p>Registration: Check if your event requires registration. If checked, additional fields will appear asking if you need an online registration site.</p> <p>Event planning: Check if you would like event assistance (e.g. catering, room reservations).</p> <p>Consultation: Check if you would like program planning or constituent relations assistance from WFAA's Alumni Relations & Engagement team.</p> <p>Program content: Check if you would like the assistance with topics, speakers, activities.</p> <p>Add to Advancement Calendar: This is checked by default, indicating that your event will be added to the online Advancement Calendar. The calendar will contain a link to a page describing your event. Please uncheck if you do not want your event published.</p> <p>Add to Badger Bridge: Check if you would like your alumni event added to our Badger Bridge page. Please review our guidelines</p>
<p>Event Type</p> <p><i>Field appears only if you select Event Planning.</i></p>	<p>Select all that apply. This will help determine the scope and services of your event.</p>
<p>Do you need online registration managed by WFAA?</p> <p><i>Field appears only if you have indicated that your event requires Registration.</i></p>	<p>Indicate Yes if you need online registration for the event managed by WFAA. If you are handling registration on your own, select No.</p>
<p>Event Name*</p>	<p>This is the event title that will be published on the Advancement Calendar (if applicable). The title should include the name of the campus unit, department and/or program.</p>

<p>ABE Event Lookup ID(s)</p>	<p>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.</p>
<p>Are you planning to accept credit card payments onsite at this project/event?</p>	<p>Indicator to our gift processing team expect transitions or indicates you may need access to an onsite credit card processor</p>
<p>If yes, please indicate what these transactions are for (select all that apply)*</p> <p><i>Field appears only if you have indicated that your event requires onsite credit card credit card payments</i></p>	<p>Select all types of transaction you need to conduct, or use Other field if you are unsure</p>
<p>Chancellor attendance requested? (if you have already requested or would like to request)</p>	<p>Indicator that the Chancellor will be attending or you would like the Chancellor to attend your event. We cannot guarantee the Chancellor will attend your event if it is requested.</p>
<p>Is there a registration fee for this event?*</p> <p><i>Field appears only if you have indicated that your event requires Registration.</i></p>	<p>Indicate Yes if there are any fees.</p>
<p>Registration Fee, if known:</p> <p><i>Field appears only if you have indicated Yes on the question above</i></p>	<p>Dollar amount or estimate</p>
<p>Do you know the event date?*</p>	<p>Provides a Yes/No selection</p>
<p>Event Dates*</p>	<p>Start and end dates. Start date is required.</p>
<p>Event Time</p>	<p>Start and end times. The start time is desired for event configuration, but not required.</p>

<p>Ballpark Event Date*</p> <p><i>Field appears only if you have indicated No on Do you know the event date</i></p>	<p>A general date range such as <i>Fall 2016</i> or <i>Prior to Homecoming</i></p>
<p>Event Category*</p>	<p>Select from the supplied list.</p> <p>Descriptions of the available options are listed in Appendix A at the end of this document.</p>
<p>Event City*</p>	<p>General region or area of the event (e.g. <i>Madison</i> if the event is actually in Middleton; <i>Milwaukee</i> if the event is actually in Shorewood)</p>
<p>Venue Name and Venue Address</p>	<p>Name and address of the location for the event.</p> <p>The Venue Name is where you can supply information like <i>Victory Mansions</i> or <i>Winston Smith Auditorium</i>.</p>
<p>Is this a ThankView message request?</p>	<p>Provides a Yes/No selection</p> <p>View more information and guidelines on Thankview.</p>
<p>Has this been approved by your School/College Advancement Dean?*</p> <p><i>Field appears only if you selected No to Are you an employee of the Wisconsin Foundation and Alumni Association?</i></p>	<p>Provides a Yes/No selection</p>
<p>Advancement Dean's Name*</p> <p><i>Field appears only if you selected No to Has this been approved by your School/College Advancement Dean?</i></p>	<p>First and last name of Dean</p>
<p>What marketing services do you need? (Check all that apply)*</p>	<p>Check the services you expect to use. Follow-up discussions and planning meetings may modify your set of services.</p>

	<p>Marketing strategy (consultation, planning)</p> <p>Copywriting/editing/proofreading - (all UW- and/or WFAA-branded projects completed in partnership with WFAA will follow the official UW–Madison Editorial Style Guide)</p> <p>Feature/news writing (news release, story)</p> <p>Graphic design (layout, images)</p> <p>Print production (brochures, flyers, invitations)</p> <p>Email development and distribution</p> <p>Web content</p> <p>Social media</p> <p>Video (development, production)</p> <p>Photography</p> <p>Mail/other distribution</p> <p>List Request (address, email, phone)</p> <p>Phone/Badger Call</p> <p>None of the above - or select if you only want an event added to the Advancement Calendar</p>
<p>Will you solicit for a gift/donation in this project/event?*</p>	<p>Gifts/donations are charitable gifts. This includes “hard” and “soft” asks/solicitations or post-event solicitations.</p>
<p>Tell us more about your project and the services you need.*</p>	<p>Describe the project <u>and</u> the services you need.</p> <p>Please be thorough and expand upon the services (event and marketing) you checked above. Provide key information to help the team understand the scope and needs of your project.</p>
<p>Additional Documentation</p>	<p>If available, supply documents to assist in the planning of your project (e.g. historical information, content, contracts, logos).</p> <p>This not required or can be provided at a later date.</p>
<p>Goal and desired outcomes*</p>	<p>Outline <u>quantitative</u> success measures (e.g. attendance, revenue, interactions, donations, stewardship).</p> <p><u>Quantitative</u> means something that can be measured.</p>

<p>Audience description*</p>	<p>High level description of audience (e.g. donors, alumni, regions, ABE attributes)</p> <p>This will not replace a List & Report Request , but it will help to determine parameters and populations.</p>
<p>What is the <u>primary</u> strategy for this initiative?*</p>	<p>Engagement: Growing positive connections and strengthening relationships with the University, Schools, Colleges, or Departments.</p> <p>Development: Raising money to support the advancement mission of the University, Schools, Colleges, or Departments. <u>Goal is donations.</u></p> <p>Revenue: Generating dollars to support WFAA operations. <u>Goal is sales.</u></p> <p>Awareness: Increasing knowledge or understanding about a particular program or entity.</p>
<p>Are there any secondary strategies? Please check all that apply.</p>	<p>If your project has a secondary strategy, indicate it by checking all appropriate boxes.</p>
<p>Budget</p>	<p>Can be an estimate.</p>
<p>Timing of project*</p>	<p>The general date range for the completion of the project (e.g. <i>Fall 2016 or Prior to Homecoming</i>)</p> <p>Key milestones will inform the project schedule and allocation of resources. Please see the Project Timelines.</p>

Appendix A: Event Category Definitions

CATEGORY	DESCRIPTION
Advocacy	Activities that educate/inform/activate alumni on key policy and higher education issues
Affinity Group	Activities initiated by external alumni affinity groups, usually based on student involvement. Examples include Alumni Band, and House Fellows, Spirit Squad, etc.
Alumni Chapters	Engagement event (social, enrichment, sendoff, etc.) lead and sponsored by alumni chapters. NOT including chapter-sponsored volunteer activities. Those would fall under Volunteer.
Alumni Park	Original programming (social, enrichment, fundraising) initiated by Alumni Park Team. Does not include activity of existing programmatic areas taking place in Alumni Park.
Athletic Event	Organizationally-sponsored events around athletic events, including Day-of-Game, Huddle, Home Field Advantage, or other athletic events. NOT for single game tickets or athletic events with a primary focus of stewardship.
Athletic Tickets	Single game ticket sales (not for Wisconsin Club or Chancellor Suite).
Athletic Travel Program	Athletic Tours (not Day of Game, Huddle or other events associated with these trips).
Award/Recognitions/Scholarships	Activities that celebrate and acknowledge individuals and achievements (e.g. Alumni Awards, scholarship receptions)
Board/Committee Meeting	Campus Boards of Visitors, WFAA Board, WAA President's Advisory Council, committee meetings/events.
Campus Advancement	WFAA led activities for the benefit of campus partners, including informational meetings, Lunch and Learn and ABE refreshers.
Career/Networking	Activities focused on career networking, career resources, mentoring, and professional connections.
Commencement	Initiatives related to UW student spring and winter commencement.

Comprehensive Campaign	WFAA-wide sponsored campaign events (pre, launch and encore), not campus-unit specific.
Development/Cultivation	Engagement activity with the primary purpose of identifying prospects / donors or raising funds for particular WFAA fund groups. Could include campus unit events related to the comprehensive campaign.
Diversity and Inclusion	Activities initiated with the Diversity team at WFAA and in partnership with campus partners with the purpose of informing and connecting alumni of color and all alumni around diversity initiatives.
Donor/Member Stewardship	Activities that recognize groups of constituents through special opportunities (e.g. BHS Luncheon, Wisconsin Club, WAA member events)
Enrichment/Alumni Learning	Local and regional activities featuring UW faculty and focusing on content.
Founders' Day	Annual, WFAA-sponsored event which brings UW faculty, staff and/or alumni speakers to chapter events, usually during spring semester.
Giving Societies/Stewardship	Activities (social and enrichment) for established donor giving societies such as Bascom Hill Society, Van Hise Society, 1848 Society, Middleton Society.
Grandparents University	Self-named. Three sessions of Grandparents University and associated, organized committee and volunteer meetings.
Homecoming	Events and activities around Homecoming
International Alumni Relations	Engagement activity occurring overseas, sponsored by WFAA, the university and/or international alumni chapters.
Regional Advancement	WFAA driven initiatives and programs that are designed with, and support campus partner and development priorities in key regional areas.
Reunions	Class or affinity group reunions (e.g. Daily Cardinal, All Nursing Alumni Reunion, 50th Class Year)
Social/Celebration	Activities that celebrate a milestone or special moment in time, including campus building groundbreaking or grand opening

	ceremonies, departmental anniversaries, welcome receptions or gatherings.
Students and Recent Grads	Events and activities with the primary audience of student and recently graduated alumni.
Volunteer	Participants in organization or chapter-sponsored volunteer activity (tagged as Volunteers rather than Participants). Also, alumni who have signed up / created profiles in the volunteer module.
WAA Travel Brochure Request	Transactional only. For people who have requested information about travel programs.
WAA Travel Program	Participation on WAA-sponsored, international and domestic, non-athletic trips and travel events (i.e. Traveler Reception).
WAA/UWF Corporate	Staff meetings & celebrations