

Graziadio School Office of Alumni Relations Guide

The following is a description of resources and services that the Office of Alumni Relations provides as well as the processes for requesting services. For any questions please contact Graziadio School Office of Alumni Relations at 310.568.5639 or gsbmalumni@pepperdine.edu.

I. Monthly E-newsletter Email

The alumni e-newsletter is the primary tool we use to communicate with our alumni population. This correspondence is sent on the fourth Tuesday of each month. University and school news, alumni events, and class updates are included. These items are mainly compiled from the GRAZIADIO SCHOOL calendar (TRUMBA <http://bschool.pepperdine.edu/events/>).

To have an item included in the newsletter, fill out the Alumni Relations Support Survey and select the appropriate option. Note that if your item is an event, it must already be on the GRAZIADIO SCHOOL TRUMBA calendar and have a link (TRUMBA link). **A request for inclusion in the newsletter must be submitted two weeks prior to the newsletter send date.**

<http://bitly.com/GSBMalumnisupportrequest>

II. Monthly Upcoming Events Email

The upcoming events email is a list of upcoming events for alumni. This correspondence is sent on the second Tuesday of each month.

To have an item included in the events email, fill out the Alumni Relations Support Survey and select the appropriate option. Your event must already be listed on the business school calendar (TRUMBA). **A request for inclusion in the events email must be submitted two weeks prior to the events email send date.**

<http://bitly.com/GSBMalumnisupportrequest>

III. Alumni Volunteers

Though the primary responsibility for recruiting alumni to support activities lies with the requesting department, the Office of Alumni Relations will always do our best to help recruit alumni to support events and recommend speakers via the Graziadio Alumni Network (GAN) Councils.

To request alumni volunteers, fill out the Alumni Relations Support Request form and select the appropriate option. Please include any specifics such as desired program and/or industry. **A request for alumni volunteers should be submitted a month prior to the event date.**

<http://bitly.com/GSBMalumnisupportrequest>

IV. Alumni Data Updates

For alumni data updates, advise the alumnus to visit the Alumni Directory at <http://www.pepperdine.edu/alumni/onlineservices/>

V. Alumni Data Requests

Alumni data requests should be submitted to Chris Butler via "Advancement Information Management-Retrieval Request Form" (see attachment 1). Please send gsbmalumni@pepperdine.edu an e-copy of your request.

VI. Alumni Relations Event Planning Calendar

The Office of Alumni Relations maintains an planning calendar in outlook that includes all scheduled alumni events as well as *proposed* events that are not yet advertised on the Graziadio School calendar, called Trumba. Please follow the instructions below to be able to easily access this planning calendar via your outlook or the website for event planning purpose so we avoid duplicate events on the same day. Please inform the Office of Alumni Relations as soon as possible if you have an event that you are inviting alumni to attend so it can be added to the Alumni Relations planning calendar.

A. Access to Alumni Relations Event Planning Calendar

1. Via Website:

To view the Graziadio internal Alumni Relations Planning Calendar click on

http://www.google.com/calendar/embed?src=pepperdine.edu_mf9521lq7q38p67lbtlkb4n63c%40group.calendar.google.com&ctz=America/Los_Angeles

2. Via Outlook:

To Update your Outlook with the Graziadio Alumni Relations Event Calendars:

1. Go to Outlook
2. Click on Calendar
3. Click on Open Calendar
4. Select from Internet
5. Copy and paste this url in the text box
 - a. For Graziadio Alumni Relations Planning Calendar:
http://www.google.com/calendar/ical/pepperdine.edu_mf9521lq7q38p67lbtlkb4n63c%40group.calendar.google.com/public/basic.ics
 - b. Holidays Calendar:
<http://www.google.com/calendar/ical/en.usa%23holiday%40group.v.calendar.google.com/public/basic.ics>
6. Click ok
7. The calendars will be added to your selection list on the left bar of your outlook account.

B. Access to the Graziadio School Calendar (Trumba) and University Calendar

1. To view the Graziadio School (TRUMBA) Events Calendar (public) click on <http://bschool.pepperdine.edu/alumni/events/>
2. To view the University Events Calendar (public) click on <http://www.pepperdine.edu/calendar/>

Attachment 1

Advancement Information Management -- Retrieval Request Form

*Required fields are in bold.

1. Requested By: Department: Phone Ext:

2. What is this going to be used for?:

3. Date Requested: Date Needed: Do Not Run Before: Expected No. of Records:

---- Please check (✓) appropriate information below ----

4. I would like the following:

Form with checkboxes for QUERY (Selection Criteria), Dynamic, and Static.

Form with checkboxes for DOWNLOAD (File of Records), Word, CSV, XLS, MDB, and Other.

Form with checkboxes for REPORT, Custom, and Hard Copy.

New -- Existing -- Name: Created by:

5. Who do you want?: (i.e. SC and PC Alums, who graduated between 1992 and 1997 and live in So. Calif.)

6. Exclusions: Do Not Call, Do Not Mail, Do Not Solicit, Deceased, Inactive, No valid Address, Do Not Release Record, Do Not E-Mail, Anonymous (for Gifts), No Vendor Solicitation, Regents, Univ. Board, PA's, GPS, Other.

Special Handling: Ignore Do Not Mail (used for Private Lists) Name of List: For Solicitation? Yes No Other:

7. Please use the questions below where applicable.

Gift Information:

- 1. Gift Date(s): From: To:
2. Gift Amount:
3. Gift Type: Cash, Stock, Gift-in-Kind, Pledge
4. Include soft credit gifts? (i.e. an org or individual pays for someone else) Y/N
5. Include matching gifts? (this counts the matching gift for the company and the person) Y/N
6. Include only specific types of funds (all Unrestricted, all Restricted, etc). List each type:
7. Count a person's gift(s) multiple times per criteria (i.e. a person is an alum and parent. Count for each category?). Y/N
8. Include count of gifts? Y/N Donors? Y/N
9. For FY Comparisons, please indicate if you want FY time periods compared to date. Y/N

Alumni Information:

- 1. Count alum: (a) for their preferred school only? Y/N OR (b) for each school attended? Y/N
2. Count only degreed alums? Y/N if not, then list which types to count:
3. Include only specific degrees? Y/N (undergrad, graduate) List:
4. Include only specific majors? Y/N List:

8. Output Fields to Include the following fields: Please be as specific as possible: (i.e. Name, Constituent Codes, Assigned Solicitors, Last Gift and Date, City, State, Zip Code, Addressee, Salutation, Preferred Address, Home Phone, Business Phone, Total Giving, Fax, E-mail, School, Class of, Major, c.)

9. Sort Order: Alpha, Zip-Code, Other

10. Address Types: Preferred, Home, Business, Campus, Parent, Other
Phone Types: Home, Business, Fax, E-Mail, Web, Other

11. Addressee Criteria: Individual, Joint, Primary, Other
Salutation: Criteria: Formal, Informal, Primary, Other

12. Approvals: if you are requesting any of the following information, please obtain the prior approval of the following Individuals: Financial: T. Rolston; Associates: N. Ashby; UB, BOR: L. Marshall; Alumni: M. Ebbing

13. Special Instructions: (Please sketch the desired report layout or attach any special instructions)

Please send form to Adv. Services -- Mail Code: TAC-4152 ; FAX: (310)506-4153; For questions call Chris Butler (6415)

Office Use Only

Notes: Date Received:
Number of records extracted: Completed By: Counts as: requests Date Completed: