



ARTS COUNCIL
of NEW WESTMINSTER

eTapestry Training

Session 1



Kickoff Training! Our goals today...

1. Welcome to the ACNW's CRM: eTapestry!
2. What the heck's a CRMS? Why have one?
3. What's the work involved?
4. eTapestry Lingo Bingo!
5. Demos & Try it out activities
6. What to expect: Training Schedule & self-enrolment
7. Takeaways
8. Action items

Team Introductions



Welcome!

- What have you already heard about eTapestry?
- 1 word that describes how you're feeling about today's session (or eTapestry in general)?
- Something you'd like to know/learn/ask?

What's a CRM?

Where did CRMs come from?

Why do Charities use CRMs?

How do other non-profits use CRMs?



WHAT IS CRM?

Why does ACNW need this?



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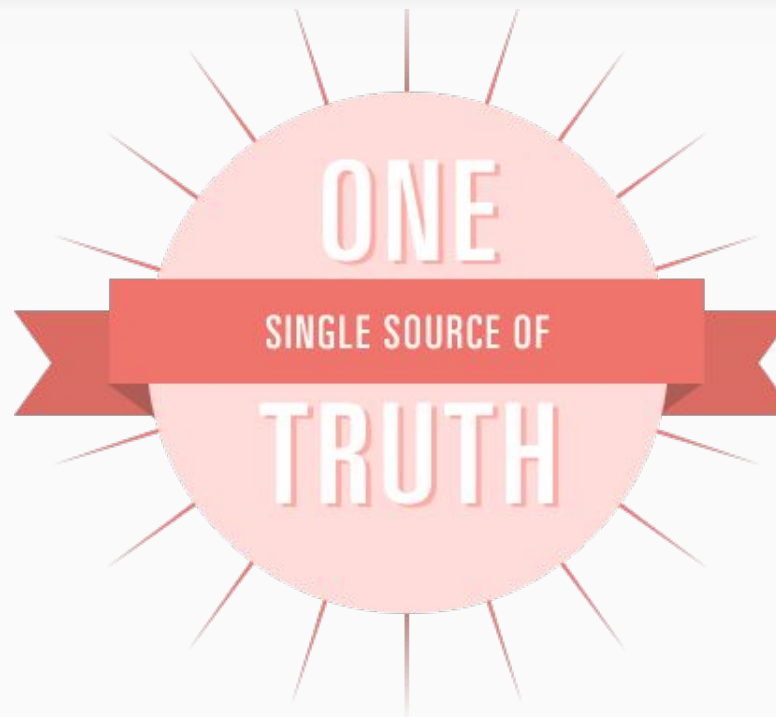
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eTapestry®

Why does ACNW need this?

1. Serve our community more efficiently (spend time on the most important stuff)
2. Single Source of Truth (SSOT)- less room for error/confusion
3. ACNW is growing! Time to delegate
4. Powerful board = ready to tackle big projects
5. Other reasons?



ACNW's Goals/Dreams

1. What will success look like?
2. How will we measure success?
3. What would you personally/professionally like to learn or develop?



How eTap Will Impact Your Work

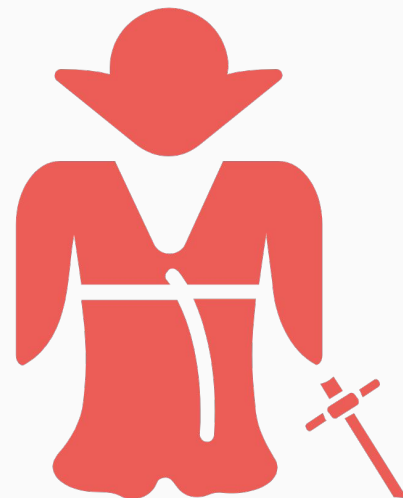
What questions/issues do you encounter the most from constituents?

- I lost my membership receipt...
- I want to purchase membership...
- I want to volunteer...

What are some of the things ACNW staff might need to do?

- Send a newsletter to certain people...
- Email all members with an announcement...

You will all become QUERY MASTERS very soon!



Database Management Principles

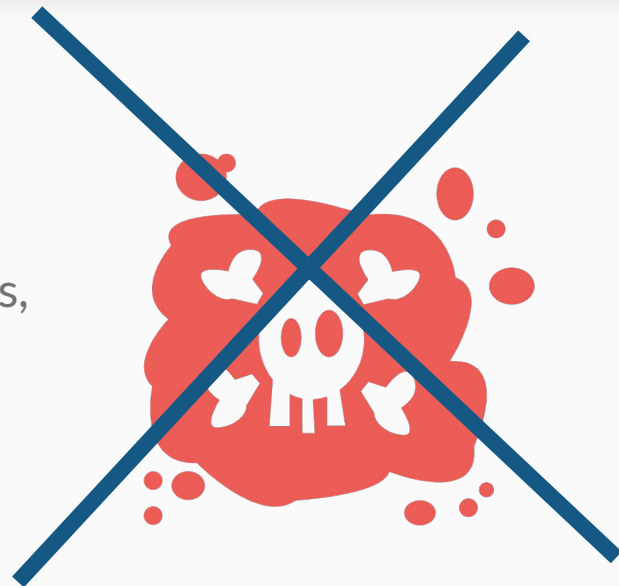
Guess what!? We're adopting a puppy! Or a kitten! Together!



Database Management Principles

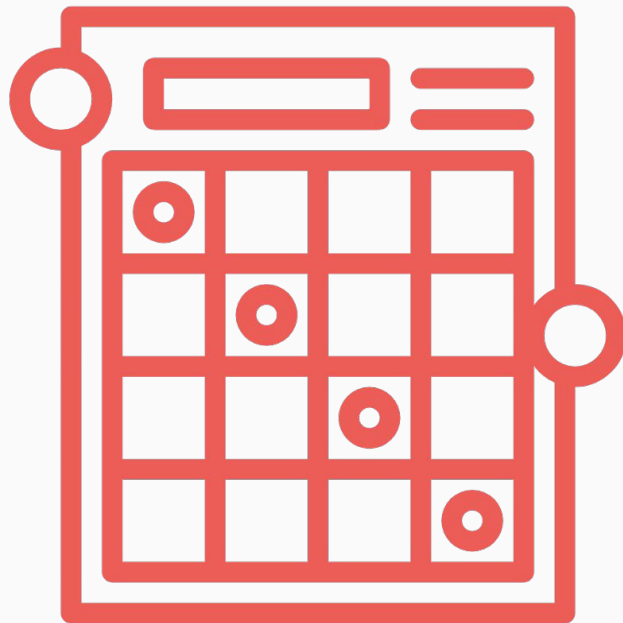
5 guiding principles of data management

1. Craft a Data Management Strategy
2. Define Ownership & Stewardship
3. Use Metadata (vs. raw data - tagging, back end fields, etc.) aka “the back end”
4. Ensure Data Quality (accuracy, clarity, consistency)
5. Maximize Data Use (use it or lose it!)



eTapestry Lingo Bingo!

Let's get familiar with some of the eTapestry jargon (it's a bit different...)



Compliance Stuff



Privacy

Confidentiality

Passwords- keep them secure , change in 3 months

Laptops (lock after 2 minutes)

Cybersecurity best practices

eTap Admin access levels will vary (for now)

Logins! Try it Out!

Step 1: Log into 3 sites

- Blackbaud ID
- eTap
- Training Central

Step 2: Add avatar/profile pic & update contact info


Demo 1: Personal Accounts

Try it out!

1. Search for your account
 - Edit your account (add information)
 - Check the UDFs - adjust if needed, SAVE
2. Look someone else you know up

What's the "Story" we can tell about this constituent?

Demo 2: eTapestry & Our website



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*Bringing Community Together
Through the Arts*

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Membership

NEW! As of January 1st, 2020 Memberships are good for one year from the date of purchase. Not sure if your membership is up to date? Email us at info@artsnw.ca to find out.

Membership Types	Annual Fee
Individual Membership	\$30
Senior / Youth Membership	\$21
Non Profit Group Membership	\$75
Corporate Membership	\$150

Membership Benefits	Individual	Senior / Youth	Non Profit Group	Corporate
Membership Benefits	\$30	\$21	\$75	\$150
Subscription to our eNewsletter	X	X	X	X
Voting Privilege at the Annual General Meeting	X	X	X	X
Rental use of The Gallery at Queen's Park, the Lower Studio, and the Centennial Lodge	X	X	X	X
Opportunity to submit articles, calendar items, events and promotions to the eNewsletter			X	X
Submission to our annual ACAM Member Report			X	X
Logo prominently displayed in our online Member Directory			X	X

Membership Information

Membership Type*

- ☐ Individual \$30
- ☐ Senior \$21
- ☐ Youth \$21
- ☐ Non-Profit \$75
- ☐ Corporate \$150

Which artistic discipline do you identify with most?

- ☐ Visual Arts
- ☐ Performing Arts
- ☐ Literary Arts

Contact Information

If you are purchasing a membership on behalf of an organization, company or non-profit, please fill out: Business/Organization Name.

Title

First Name*

Last Name*

Business/Organization Name

Account Type*

(None Selected)

THE GALLERY AT QUEEN'S PARK

Monday - Tuesday Closed
Wednesday 1:00 PM - 8:00 PM
Thursday - Sunday 1:00 PM - 5:00 PM

DONATE NOW

Subscribe to our mailing list

+ indicates required

Email Address

First Name


Last Name

SEARCH

To search, type and hit enter

Membership
webform

Donation
webform



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Donate

When you make a donation to the Arts Council of New Westminster, you're not just supporting the arts — you're making our community a more healthy and vibrant place for everyone.

The Arts Council of New Westminster is a registered charitable organization that works to make the arts essential and accessible in our city. Made up of hundreds of artists from across New Westminster, the arts council delivers programs that build community and facilitates cross-cultural understanding. We offer a wide variety of free outdoor and indoor arts activities including Music by the River, New West Craft, ArtsToGo workshops, Upstream Unplugged, The Gallery at Queen's Park and more. In 2019 the Arts Council of New Westminster presented 336 diverse artists in events that welcomed 14,000 guests in New Westminster. We are an essential part of making our community an inclusive, vibrant and engaged community.

Donate today, and give the experience of arts and culture.

What can my monthly donation do?

- A \$25 gift will send five children to an ArtsToGo arts workshop in the heart of the city.
- A \$50 gift will sponsor a local artist's or group exhibition in The Gallery at Queen's Park. Notable exhibitions from 2019 include the "History in Relief", The ACNW Permanent Collection and The Art of Queer for New West Pride Week.
- A \$100 gift will support our original music programming at annual events like Music By the River. Local artists perform a variety of styles and genres along the banks of the Fraser River. In 2019 we collaborated with the Savage Society to launch the original Indigenous Music Series.
- A \$250 donation will support the Hilda Cliffe Scholarship Fund, an annual arts award that recognizes the talent of a deserving New Westminster Secondary School arts student. Help launch a lifetime of creative success.

Make a gift in the name of those special friends and family on your list. All donations over \$20 will receive a tax receipt.

Our donors all receive advance invitations to our special community events. You will be recognized for your generosity and commitment to making New Westminster a stimulating and sustainable city.

Make a Donation

Donation Amount*

- ☐ Coral Donor - \$100
- ☐ Jade Donor - \$250
- ☐ Pearl Donor - \$500
- ☐ Other \$

Donation Frequency*

One Time

I'm making this donation...

(None Selected)

Please enter the name in the comment field below.

Contact Information

Title

First Name*

Middle Initial*

Last Name*

Members vs. Donors



How does membership work?

What are we legally obliged to do ?

Try it out! Use a fake credit card and make a donation

Test out the “donor experience” (from start to finish)

Takeaways

In your words...

What are the 3 most important points from today's sessions?



Takeaways

1. eTapestry is going to help the ACNW serve our community better
2. It's our collective responsibility to keep the data tidy and useable
3. You're supported! Training is coming!
4. Your input is needed! Our data needs your eyes on it!



Action Items

1. Log into Training Central
 - a. Enroll yourself in eLearning
 - b. Withdraw if you can't make a live, online session
 - c. Register for another date (or ask Leah/Stephen)
2. Log into eTapestry
 - a. Add a profile picture (for all your Blackbaud logins!
 - b. "Tidy" up 3 constituent accounts that you work with often
3. Send Leah questions/requests for Session 2 by Wed. Feb. 19
4. Anything else?



Requests? Questions?

Session 2: Friday, February 21
12-2:30 pm @ The Gallery



**LEAH CHANG
LEARNING**

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