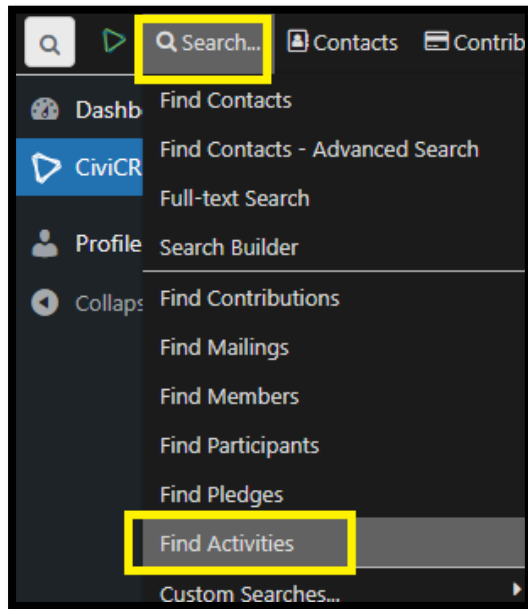


## NAEH STANDARD OPERATING PROCEDURE (SOP)

### Using CiviCRM to Find Prospective Speakers

**Full Video Instructions:** [https://youtu.be/Q\\_49DSfwMHk](https://youtu.be/Q_49DSfwMHk)

1. In Civi, click *Search > Find Activities*



2. Under *Activity Type*, select *Speaker – Confirmed* and *Moderator – Confirmed*.
3. Under *Activity Text*, type in any subject words you want to search by. Click *Search*.

A screenshot of the 'Find Activities' form. The 'Edit Search Criteria' section is expanded. The 'Activity Type' dropdown menu is open, showing a list of options: 'Speaker - Confirmed' (highlighted with a yellow box), 'Moderator - Confirmed', 'Speaker - Cancelled', 'Meeting', 'Phone Call', 'Email', 'Outbound SMS', and 'Event Registration'. The 'Name or Email' field is empty, and the 'With', 'Assigned to', and 'Added by' radio buttons are all unselected.A screenshot of the 'Find Activities' form. The 'Edit Search Criteria' section is expanded. The 'Activity Type' dropdown menu is set to 'Speaker - Confirmed'. The 'Activity Text' field contains the text 'health and safety' (highlighted with a yellow box). The 'Details Only', 'Subject Only', and 'Both' radio buttons are all unselected. The 'Search' button at the bottom is highlighted with a yellow box. The 'Name or Email' field is empty, and the 'With', 'Assigned to', and 'Added by' radio buttons are all unselected.

You can then see speaker names associated with the subject you searched.

You can click on their names to open their records and retrieve their contact information.

Type	Subject	Added by	With	Assigned	Date
Speaker - Confirmed	1.2 Health and Safety Issues in Encampments	McDonald, Sharon	Maple, Brittany	n/a	January 28th, 2022 4:43 PM
Speaker - Confirmed	1.2 Health and Safety Issues in Encampment	McDonald, Sharon	Mosites, Emily	n/a	January 27th, 2022 5:49 PM
Speaker - Confirmed	1.2 Health and Safety Issues in Encampments	McDonald, Sharon	Richer, Amanda	n/a	January 27th, 2022 3:11 PM
Speaker - Confirmed	1.2 Health and Safety Issues in Encampments	McDonald, Sharon	Dzvonik, Joseph	n/a	January 25th, 2022 2:49 PM
Speaker - Confirmed	1.2 Health and Safety Issues in Encampments	McDonald, Sharon	Dzvonik, Joe	n/a	January 19th, 2022 12:42 PM
Speaker - Confirmed	1.2 Health and Safety Issues in Encampments	McDonald, Sharon	Weir, Laurel	n/a	January 19th, 2022 12:38 PM
Speaker - Confirmed	9.05 Promoting the Health and Safety of People Living with Behavioral Health Disabilities	McDonald, Sharon	Knestrick, Christopher	n/a	September 14th, 2021 11:11 AM
Speaker - Confirmed	9.05 Promoting the Health and Safety of People Living with Behavioral Health Disabilities	McDonald, Sharon	McKee, Melissa	n/a	August 29th, 2021 11:19 AM
Speaker - Confirmed	9.05 Promoting the Health and Safety of People Living with Behavioral Health Disabilities	McDonald, Sharon	Larsen, Anne	n/a	August 29th, 2021 11:17 AM
Speaker - Confirmed	6.01 Ensuring the Health and Safety of Unsheltered Adults	McDonald, Sharon	Zevin, Barry	n/a	January 7th, 2020 9:54 AM
Speaker - Confirmed	6.01 Ensuring the Health and Safety of Unsheltered Adults	McDonald, Sharon	Carter, Joslyn	n/a	December 13th, 2019 11:41 AM
Speaker - Confirmed	6.01 1.01 Ensuring the Health and Safety of Unsheltered Adults	McDonald, Sharon	De Jong, Iain	n/a	December 10th, 2019 10:54 AM

Once in their record, you can also click on *Events* button to see exactly at which conference they spoke.

**Ms. Brittany Maple**

Add

Edit

Delete Contact

Summary

Contributions 1

Pledges 0

Memberships

Events 1

Activities 2

Relationships 1

This page lists all event registrations for Ms. Brittany Maple since inception. Click [Add Event Registration](#) to register the credit card.

Add Event Registration

Submit Credit Card Event Registration

**Event**

Ending Unsheltered Homelessness: Strategies and Policies that Work (Speakers, Volunteers, Scholarships, Sponsors) (participants)

**There are additional documents to use for speaker recruitment ideas. Please use all resources provided by the Meetings & Events team for each conference.**