

**Coca-Cola Scholars Foundation | Event Management Worksheet**

Date of Event: \_\_\_\_\_

Time of Event: \_\_\_\_\_ ☐ a.m. ☐ p.m.

Event Location (City/ST): \_\_\_\_\_

Event Venue: \_\_\_\_\_

Staff Contact: \_\_\_\_\_

AB Contact: \_\_\_\_\_

Event Type: (select one)

- ☐ Networking or Professional  
☐ Development  
☐ Service  
☐ Undergraduate only  
☐ Reception for all  
☐ Family  
☐ Other \_\_\_\_\_

Invite: (select all that apply)

- ☐ All Scholars & Alumni  
☐ Scholar Year \_\_\_\_ to \_\_\_\_  
☐ Undergrad Scholars Only  
☐ Alumni Scholars Only (4+)  
☐ Board of Directors  
☐ Scholars in \_\_\_\_\_  
☐ Local Scholar & Alumni  
☐ Local Coca-Cola  
Representatives/Bottlers  
☐ Non-Scholar Participants

Staff Needed: (select one)

- ☐ Full Team  
☐ 3-5 Members  
☐ 1-2 Members  
☐ None

Guests: (select one)

- ☐ Yes, all guests & family are welcome  
☐ Yes, just spouse/significant other  
☐ No

This event will need: (select all that apply)

- ☐ Online Registration  
☐ Content and Details Online  
☐ A BBNC email invitation

Price (check all that apply):

- ☐ Free  
☐ Cost only to participant, not CCSF  
☐ \$\_\_\_\_./person  
☐ Include a donation form at registration

Participant Attributes: (i.e. t-shirt size, special accommodations, dietary needs, etc.)

- ☐ \_\_\_\_\_  
☐ \_\_\_\_\_  
☐ \_\_\_\_\_  
☐ \_\_\_\_\_  
☐ \_\_\_\_\_

This Event Will:

- ☐ Showcase  
☐ Sustain  
☐ Strengthen  
...by

External Assistance/Engagement:

- ☐ Alums in the area including

- ☐ Sponsors in the area including

- ☐ Other contacts in the area including

### Pre Event Task Matrix

All roles below should be assigned before beginning the process of creating the event. Check with each person involved and have them SIGN off (initials are fine) on their responsibilities before proceeding.

\*Some may be redundant from the previous page, but are important to define.

- \_\_\_\_\_ will create the Event within Raiser's Edge. (CCSF staff)
- \_\_\_\_\_ will create the invite list in a Query or Query list and save it in the "Events" folder.  
*Name the Query in the following format "Year – EventCity EventType Invite List" (CCSF staff)*
- \_\_\_\_\_ will use the query to globally add the Appeal and the Event Invitation to the constituent record. CCSF staff)
- \_\_\_\_\_ will draft the BBNC email message. (AB committee member)
- \_\_\_\_\_ will edit the BBNC email message. (CCSF staff)
- \_\_\_\_\_ will create the BBNC registration form part, and page, as well as add it to the Alumni Portal Custom Events Landing Page. (CCSF staff)
- \_\_\_\_\_ will develop any relevant content for the BBNC page. . (AB committee member)
- \_\_\_\_\_ will edit any relevant content for the BBNC page and post it to the page. (CCSF staff)
- \_\_\_\_\_ will process registrations into the Raiser's Edge and create a pool for donations or fees if relevant. (CCSF staff)
- \_\_\_\_\_ will provide development prospects for individual meetings, individual prospects for the event itself, messaging and talking points. (AB committee member)
- \_\_\_\_\_ will set up food/drinks/caterer. This included contacting the local bottler for drinks. (AB committee member)
- \_\_\_\_\_ will create an agenda for the event. (AB committee member)

#### Media/Communication Deliverables:

- ☐ Videos
- ☐ Photos
- ☐ Articles
- ☐ Hashtag \_\_\_\_\_
- ☐ Other \_\_\_\_\_

#### Swag:

- ☐ T-Shirts
- ☐ Beats headphones
- ☐ Zip drives
- ☐ Other \_\_\_\_\_

#### Swag (if any) will be:

- ☐ Shipped ahead to hotel
- ☐ Carried to location
- ....by \_\_\_\_\_

#### We will need:

- ☐ A production team
- ☐ Volunteer Help
- ☐ Media/Journey
- ☐ Communications Manager
- ☐ Nametags
- ☐ Caterer

**Post Event Task Matrix**

\_\_\_\_\_ will create the BBNC feedback form survey to go to Event Participants. It will be sent out when? \_\_\_\_\_. (AB member with CCSF staff)

\_\_\_\_\_ will go through Event in Raiser's Edge and mark who attended/who didn't. (CCSF staff)

\_\_\_\_\_ will schedule and plan a debrief with staff, with relevant alumni leaders, and with external partners or contacts. (AB member)

\_\_\_\_\_ will add specific connections/relevant notes for attendees in Raiser's Edge. (CCSF staff)

\_\_\_\_\_ will enter relevant ratings into Raiser's Edge for participants. (CCSF staff)

\_\_\_\_\_ will provide final budgeting report. (AB member)

\_\_\_\_\_ will create follow up actions in Raiser's Edge. (CCSF staff)

\_\_\_\_\_ will send thank you notes and/or prizes. (CCSF staff with AB member)

\_\_\_\_\_ will ensure the front end registration is closed at the appropriate time. (CCSF staff)

Any other comments about anything addressed in this document:

**Proposed Budget:** \_\_\_\_\_.\_\_

**Approved By:** \_\_\_\_\_

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**Signatures**

**AB Event Coordinator:** \_\_\_\_\_

**CCSF staff lead for event:** \_\_\_\_\_

**Alumni Manager:** \_\_\_\_\_

**Database Administrator** \_\_\_\_\_

*(Database Administrator will scan and file this document on the Media tab of the Raiser's Edge Event)*