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CU I&E Submission – Event Tracking Process [1]

Who

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What

The CWCTP hosts around 30 events a year, which are always in various states of organization. I needed a way to efficiently track event details, disseminate that information, and report on key event data after-the-fact.

To accomplish that, I developed a comprehensive event tracking and reporting system by creating a Google Form that collects all the preliminary event information, then automatically populates a conditionally formatted Google Sheet. The formatted sheet is then sent to a Zap (via the Zapier platform) which turns it into a Google Doc flyer. The Google Doc flyer puts all the event details in a format that can be easily shared and copied to the CWCTP website, thus avoiding the typos and other errors that can occur as event information is duplicated.

Why

If you're tracking and organizing multiple events, it's crucial that you stay on top of event information and avoid duplicating this information as much as possible. By filling out a form that tracks the event details you have, and formatting that into a spreadsheet, you can quickly identify where more information is needed. You can use this platform to create the draft of an event flyer that keeps your initial data consistent and avoids the need to create a word document via copying and pasting from the spreadsheet. The Events spreadsheet also benefits after-the-fact grant and foundation reporting by tracking critical outcomes, such as attendance, subject matter, etc.

Where

This was implemented at the CWCTP, and I would welcome the opportunity to share the tool with other units that often create, publicize, and/or report on events. I am also very interested in further streamlining the process and seeing if anyone can come up with a way to have the Google Doc automatically update based on updates to the originating Google Sheet.

When

At the beginning of AY 2016-7.

Submitted by

Alex Holmgren, Associate Director, Center for Western Civilization, Thought & Policy

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