

CCRC Spring Timeline
October, Third Thursday Meeting

Presenter(s)

TBD

Date

October, Third Thursday (e.g. October 15, 2026)

Times

TBD

Location

TBD

Other Contacts

Facilitator, venue

TBD

Catering

TBD

To Do By July 16

- ___ Proposed meeting agenda circulated to CCRC steering committee – have a draft agenda by July CCRC steering committee meeting. Have topics (maybe speakers), this will help determine venues. – meeting organizer
- ___ Proposed meeting venue circulated to CCRC steering committee—have ideas for potential venues by Jan CCRC steering committee meeting – meeting organizer
- ___ Build website announcement page, documents posted – Sheila, UCCE Santa Clara (Jenel)
- ___ Build payment link – Sheila, UCCE Santa Clara (Julie)

Mid- July CCRC Steering Committee call

- ___ Feedback to Forum Scholar, meeting leaders, about proposed agenda, venue – meeting organizer
- ___ Finalize learning objectives – meeting organizer

To Do By July 24

- ___ Reserve indoor and outdoor venues – meeting organizer
- ___ Assess need for tables, chairs, porto-potties etc, based on venue – meeting organizer
- ___ Ask/notify presenters-ask for confirmation – meeting organizer

To Do By July 29

- ___ All speakers confirmed – meeting organizer
- ___ Reserve date with caterer. After we figure out the venue we can make a list of potential caterers. – meeting organizer with help from Devii if needed
- ___ Reserve transportation, if needed. Unlikely to need this. - Devii
- ___ Draft Meeting Agenda – meeting organizer
- ___ Collect all information from presenters: - meeting organizer
 - Title
 - Organizational affiliation
 - Talk title
 - Abstract about talk
 - Food preferences
 - Any travel support or registration waiver needed
 - Invite to steering committee call on mid-March
 - Ask for biography for website. Give this to Sheila and UCCE Santa Clara (Jenel) will add to website.
 - Agreement to: Speakers agree to the following
 - Timeline
 - Attendance – partial or full day (last preferred)
 - posting presentation (are they ok with posting it on CCRC website?)
 - materials
 - photocopying support (Sheila can potentially do this for handouts)
 - Talk length

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- ___ Draft any necessary contracts/agreements – venues, transport, catering, presenters, insurance, coffee... - Devii
- ___ Insurance documents if needed - Devii

To do by July 31

- ___ Draft announcement – meeting organizer
 - ___ Finalize Draft meeting agenda for advertising – meeting organizer
 - ___ Post agenda and biographies of presenters (if available) on CCRC website – Sheila, UCCE Santa Clara (Jenel)
 - ___ Get OK on announcement from CCRC Committee and presenters: Does it accurately advertise what we expect to deliver? Does it clearly identify the appropriate audience? – meeting organizer
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**To do by August 6,
(~10 Weeks Prior):**

- ___ Email **announcement** (Bcc:) to invitees. Include a registration deadline of 24 days before the workshop - Sheila

**To do by September 10
(5 Weeks Prior):**

- ___ Continue receiving registrations - Sheila
 - ___ Additional advertising if needed - Sheila
 - ___ Create evaluation survey on surveymonkey.com - Dan
 - ___ Email presenters any information needed for presentations - meeting organizer
 - ___ Identify brochures, maps, images, etc. as appropriate for supplementary materials – meeting organizer
 - ___ Add presenters and organizers to registration list, change number of registered attendees to accommodate - Sheila
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Mid- September Steering Committee Call

CCRC Education and Outreach Conference Call – Steering committee

- ___ Finalize organizer agenda – meeting organizer
- ___ Answer presenter questions (not during this call but during this time period) – meeting organizer
- ___ Review evaluation – Dan

**To do by September 17
(4 weeks prior)**

If space is still available, send 2nd notice announcement to those who haven't responded, especially to those who ought to attend and might need encouragement. Note that the registration deadline is now three weeks away. - Sheila

- ___ Finalize/update agenda – if there are any last minute changes – meeting organizer

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- ___ finalize small group facilitator questions – meeting organizer
 - ___ Remind attendees of pending payment deadline - Sheila
 - ___ Monitor payments, registrant dates and all communications – Sheila, UCCE Santa Clara (Jenel and Julie)
 - ___ Process checks – Sheila, UCCE Santa Clara (Julie)
 - ___ Call waiting list if applicable - Sheila
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**To do by September 23
(24 days prior):**

- ___ **Last day to register**
 - ___ **Last day for those registered to cancel and only be charged \$10 for processing afterwards no refund**
 - ___ **Payment deadline**
 - ___ Ask presenters to send any materials (PowerPoint asap) that are to be included in folder. If mailing originals (e.g. brochures) is too burdensome, these can be distributed separately, but it is nicer to collate handouts in advance. Ask to receive these by 3 week before workshop. – meeting organizer
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**To do by September 24,
(3 Weeks Prior):**

- ___ **Last date to cancel workshop**
 - ___ Send a reminder/confirmation email with map/directions to attendees. Ask registered participants to notify us if they are no longer able to attend. - Sheila
 - ___ All printing should be ordered.- Sheila
 - ___ Identify small group facilitators – Devii or other steering committee
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**To do by October 1
(2 Weeks Prior):**

- ___ Confirm menu and arrival time with caterer. Give caterer directions to site. Give approximate count. – Devii or meeting organizer
 - ___ Check inventory of folder and nametag supplies and buy more as needed. - Sheila
 - ___ Create Excel spread sheet of registrants, mail formatted version to organizers, presenters - Sheila
 - ___ Receive cancellations and adjust participant list. - Sheila
 - ___ Receive presenters' PowerPoint presentations, if copies are to be included in folder. If this is impossible, ask presenters to send their presentation ASAP (copy and distribute it as a separate handout) or ask them to bring sufficient copies to workshop. – meeting organizer
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**To do by October 8
(1 Week Prior):**

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- ___ Buy non-perishable and less-perishable items on food shopping list. - Devii to assign
 - ___ Print - Sheila
 - ___ agenda
 - ___ attendee contact list
 - ___ speakers' handouts (PowerPoint printouts (6 slides per page), any other materials), if available—we may not ask speakers to do this this year.
 - ___ one or more relevant peer-reviewed journal articles
 - ___ print facilitator questions
 - ___ include any supplementary materials pertinent to topic, e.g. maps, brochures, etc - Sheila
 - ___ Give caterer an almost-final count and food choices (Devii or meeting organizer)
 - ___ Order coffee (Devii to assign)
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October Final Steering Committee Meeting

- ___ Finalize any loose ends with roles and responsibilities - Devii

To do by October 9

- ___ Receive any other materials from presenters to be included in folders - Sheila
 - ___ Make nametags (assign discussion groups), participant contact list - Sheila
 - ___ Give the caterer a final count – Devii or meeting organizer
 - ___ Print sign in sheets, special meals requests, any handouts - Sheila
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To do by October 14, (1 Day Prior):

- ___ Buy perishable items on food shopping list - Devii to assign
 - ___ If possible set up room. This may have to wait until early morning. Set up tables, chairs, nametags, folders, screen, lectern, lunch area. Put drinks in refrigerator at site, if available. – Devii to assign
 - ___ Create signage: door sign (quiet and title) and direction. - Sheila
 - ___ Test all technology – Devii or meeting organizer
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To do by October 15 (6:30 am, Day of Workshop):

- ___ Pick up coffee – Devii to assign
- ___ Buy ice– Devii to assign
- ___ Finish room set-up– Devii to assign
- ___ Set out refreshments – Devii to assign
- ___ Set up computer and projector– Devii to assign
- ___ Set-up compost and recycling– Devii to assign
- ___ Fill water canisters and set out drinks. – Devii to assign

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___ Set out: packets, sign-in sheets, handouts – Sheila

To do by (Lunch, Day of Workshop):

___ Meet caterer and help set up lunch line and drinks. – Devii or meeting organizer

To do by (evening, Day of Workshop):

- ___ Complete facility's clean-up/close-up checklist– Devii or meeting organizer
 - ___ Pack up and return all A/V equipment, handouts, and food items. – Devii to assign
 - ___ Collect recyclable cardboard, plastic, aluminum and compost– Devii to assign
 - ___ Return carafes to coffee place, if necessary – Devii to assign
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To do by evening of workshop:

- ___ Email URL link to evaluation survey to all who attended, and the presenter(s) - Dan
 - ___ Follow-up with no-shows, update on-line contact list and web site language to past tense. - Sheila
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**To do by October 22
(1 Week After):**

- ___ Remind attendees to visit survey monkey – Dan
 - ___ Remove organizers and presenters from online registration list - Sheila
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**To do by October 29
(2 Weeks After):**

- ___ Summarize evaluation comments from surveymonkey.com – email to organizers, presenters - Dan
- ___ Post workshop information on CTP website, follow-up with presenter(s) re: posted material, new and existing - Sheila

November 4

CCRC Education and Outreach Conference Call – Dan

- ___ Conduct debrief with organizers and presenters (Steering Committee)
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