

CCRC Spring Timeline  
April, Third Thursday Meeting

**Presenter(s)**

*TBD*

**Date**

April, Third Thursday (e.g. April 15, 2027)

**Times**

TBD

**Location**

TBD

**Other Contacts**

**Facilitator, venue**

TBD

**Catering**

TBD

## To Do By January 12

- \_\_\_ Proposed meeting agenda circulated to CCRC steering committee – have a draft agenda by Jan 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- January CCRC Steering Committee call

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

## To Do By January 20

- \_\_\_ 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 January 25

- \_\_\_ 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 January 27**

- \_\_\_ 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 February 4,  
(~10 Weeks Prior):**

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

**To do by March 11  
(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- March 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 March 18  
(4 weeks prior)**

If space is still available, send 2<sup>nd</sup> 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 March 22  
(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 March 25,  
(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 April 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 April 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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**April Final Steering Committee Meeting**

- \_\_\_ Finalize any loose ends with roles and responsibilities - Devii

**To do by April 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 April 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 April 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

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

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**To do by (Lunch, Day of Workshop):**

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

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**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 April 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 April 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

**May 5**

CCRC Education and Outreach Conference Call – Dan

- \_\_\_ Conduct debrief with organizers and presenters (Steering Committee)
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