

2021 CSTE Annual Conference Logistics and Agenda Planning Timeline - STAFF			
Schedule	Email / Social	Activities	Roles
June - August		Select Site for 2023 conference (no travel)	Beverly / ED / EB
July	x	Initial 2021 AC Website - Send Save the Date information to Members	IT / Beverly / Communications
July - September		Identify and develop workshops (Senior Management will identify space and funding / Program/Workforce Staff will execute development; Program will submit list of proposed workshops from CoAg as starting point)	Senior Management / Program/Workforce Staff
July - September		Research logistics, technology, support and potential for virtual components to AC (hybrid or a full conference) - Other planning tasks will be added later dependent upon research (sessions identified, speaker/moderator instructions, tech/staff support, AV, internet, platform/integrations, registration, etc.)	IT / Beverly / Communications / Virtual Meetings Workgroup / Senior Management
July - September		CE Credit Planning/Application (including options/requirements for virtual components)	Workforce Staff
August		IT update EB elections process with new dates; Review voting process	IT / Beverly / ED
August 7		Committee and staff assignments finalized for Confex programming	Dhara / Meredith
Fall EB Meeting		Obtain Planning Committee CE Form	Workforce / Stephanie
September 1 - 15		Program staff working with committees to develop topics for abstract process	Program Staff
DEADLINE – September 18		Deadline for Submission of Topics (hard deadline in CONFEX)	Program Staff
DEADLINE – September 18		Any new Confex Report Needs Identified in Detail by Program/Workforce staff and submitted to Beverly (Reports, requirements and process needs addressed by deadline)	Program/Workforce Staff/ Beverly
October - December		Sponsored travel planning (database needs, letters, emails, etc.)	IT / Accounting / Program Staff / GSS
October	x	Announce sponsor / exhibitor opportunities	Jeremy / Beverly
DEADLINE – October 1		Finalize Position Statement Office Open Hours for website, Confex programming and agenda	Program Staff
October 1 - 9		Staff abstract submission testing, provide feedback on an ongoing basis	Program Staff
DEADLINE – October 9		Staff abstract submissions testing completed in CONFEX (no test submissions after this date; screen grabs are required for requests and Hard Deadline to allow for any Confex programming)	Program/Workforce Staff/ Beverly
November - December		App vendor request for bids and review	Clay / Beverly
November 2	x	Open Call for Abstracts	Beverly / IT
November 2		Managers submit number of staff traveling for the AC to Beverly for staff block hold; Grants identify budgets; Workforce staff submit number of fellow and student scholarship rooms; Staff will make their own reservations through Passkey for AC and vacation arrangements on their own	Senior Management / Grants
DEADLINE – November 2		Enter breakout session allocations in CONFEX based on evaluation data, room counts, space limitation, and topics/needs of Sub-Committees	Beverly
December		Program team meetings to review Confex abstract review and session building (if needed)	Beverly / Program Staff
December	x	Announce Position Statement Process	Meredith / Dhara / IT / Communications
December 1 - January 6		CDC travelers for workshops and invited meetings identified	Program/Workforce Staff
December 1 - January 6		Program staff and Admins begin process of identifying sponsored travelers	Program Staff / Mone' / Admins
DEADLINE – December 1		ALL workshops FINALIZED Main Subject Titles for Registration Process; i.e.. Zika, HAI, MCH (hard deadline) ; include meeting room set requirements (classroom, rounds, etc.) from discussions with workshop member leads and program management; Subtitles with more descriptive language due in January; INCLUDE preferred final room seating and estimated seating requirements; seating may be changed based on overall AC needs; Confirmation of waitlist options; Reminder of copy/paste issue with shared spreadsheet.	Program/Workforce Staff / IT / Beverly
DEADLINE – December 1		Sponsored travel planning (database needs, letters, emails, etc.) - FINAL form requirements, including registration, emails and letters to Kevin	IT / Accounting / Program / GSS
DEADLINE – December 1		Any credit card processing requirements set-up and ready for registration opening; including tax issues/waivers for state	Shelia / Kevin / Beverly
DEADLINE – December 1		Run (or fitness activity) planning, final t-shirt design and pricing	GSS Staff
DEADLINE – December 1		CE forms, examples, and share spreadsheet for plenary and workshop speaker forms. Include all staff involved in CE form collection in review meeting (workshops and plenaries)	Workforce Staff
DEADLINE – December 1		Establish budget for student scholarships and number of recipients	Shelia / Amanda
December 1		Confirm process for sponsors and exhibitors to register	IT / Beverly / Communications
January		Confirm Speaker for Jonathan Mann Lecturer	President-Elect / Executive Board
January		Confirm Plenary Speakers	President Elect / Beverly
January / February		Planning for lapel pin design and voting	Beverly / Kevin / Shundra
DEADLINE – January 6	x	Deadline for Submission of Abstracts (hard deadline in Confex)	
DEADLINE – January 6		Deadline for CDC personnel required at workshops from staff submitted	Program/Workforce
January 7		Internal review of incomplete abstracts	Beverly
DEADLINE – January 8		IT finalized travel database needs and letters in system	IT / Accounting / Program / GSS
DEADLINE – January 8		Deadline for Program/Workforce staff to finalize list of sponsored travelers and send to Admins; Purchase orders submitted	Program/Workforce Staff
January 8-14		Program staff conduct an internal review of submitted abstracts	Program Staff
January 11-15		Admins verify debarred list for sponsored travelers	Admins
January 11-15		Review combined list of CDC workshop and abstract personnel	Program/Workforce
DEADLINE – January 14		Sponsor final payments and logos	Communications

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DEADLINE – January 14	x	Open call for EB nominations	IT / Membership
DEADLINE – January 14		ALL workshops descriptions FINALIZED for registration opening (Titles finalized back in December, Subtitles added at this point);	Program/Workforce Staff
DEADLINE – January 14		Internal transfer and reassignment of abstracts completed between committees (step 1)	Program Staff
DEADLINE – January 19		Reviewers assigned to topics (step 2) and send REVIEW Communications	Program Staff
DEADLINE – January 20		Review AC website pages and registration process for opening	IT / Beverly
January 21	x	Announce opportunity for awards nominations	Beverly / ED / Communications
DEADLINE – January 27		Sponsored Traveler list to Program/Workforce Staff for Review	Kevin
DEADLINE – January 27		Deadline for all AC website and registration pages finalized from review	IT
January 28	x	Announce student scholarship opportunities	Workforce / Shelia
January 29		State Epi travel letter to AC	Tarajee / ED / Communications
February / March		App Planning	Clay / Beverly
DEADLINE – February 2		Abstract review by external reviewers (hard deadline in Confex)	Sub-Committees / Program Staff
February 2	x	Open Registration and Hotel Accommodations	IT / Beverly
February 2		Sponsored travelers notified of support	Program Staff / Mone' / IT
February 2		Retired Past Presidents notified of support	Shundra
February 3		Program sub-committee conference calls begin	Sub-Committees / Program Staff
February 5		Presidential Priorities Award nominees sent to Review Committee and Program Leads	Beverly
DEADLINE – February 11	x	Deadline for EB nominations	IT / Membership
February 16		Registration Parked Reports uploaded	Kevin / Brett
February 19		Develop and solicit RFP for photographer	Communications / Beverly
DEADLINE – February 17		Last day for sub-committee abstract review and program planning conference calls	Sub-Committees / Program Staff
February 17 – March 10		Program staff finalize sessions and abstract determinations	Program Staff
DEADLINE – February 18		EB Nominee questionnaire distributed	Beverly
DEADLINE – February 19		Deadline to identify abstract finalists for Presidential Priorities Session and coordinate with Program Leads	President / Beverly
DEADLINE – February 24		Room types for oral presentations (breakout, quick, lightning) provided to Beverly for Confex programming. AND, transfer of any sessions to another committee. NOTE: Session building can not start until room types are updated in Confex by Beverly (allow time for programming)	Program Staff
March		Finalize and order name badges	Beverly / Clay
March 1	x	Deadline for Award nominations	Beverly / ED / Amanda
March 1		Finalize non-abstract roundtable sessions (Washington liaison, New Member, Mentor breakfast, Fellow lunch, committee sessions, invited sessions, etc.)	Communications / Workforce
DEADLINE – March 4		Student Scholarship application submission	Workforce
DEADLINE – March 4		Deadline for EB Nominee questionnaire form completed	Beverly
March/April EB Conference Call		Finalize Award Recipients & Slate of Candidates	Executive Board
DEADLINE – March 10 HARD DEADLINE for ALL committees entered into CONFEX		Program staff confirm all sessions and abstract determinations in database for speaker invitations, including moderators and poster finalists and session titles - ANY CHANGES after this date communicated to Beverly by email, do not enter in Confex	Program Staff / Beverly
DEADLINE – March 11-15; All conflicts resolved by March 15		Identify and resolve any speaker/moderator conflicts (updates in Confex will be made by Beverly)	Beverly / Program Staff
DEADLINE – March 18		Ordinary Process Position Statements Due to CSTE	Program Staff / IT
DEADLINE – March 24	x	Speaker letters of Invitation and Declined Abstracts Sent (Declined oral presentations should be addressed by program staff within 1 week of receipt)	Beverly / Kevin
DEADLINE – March 26		Deadline for plenary and workshop speaker CE forms	TBD Workforce Staff
Week of March 29		Student Scholarship recipient(s) notified of support	Workforce
March 26	x	Open Late-Breaker Abstract Process	Beverly / IT
April		Planning for presenting author reminder communications (distribution dates determined at this point)	Beverly / IT / Communications
April		Finalize arrangements and service order for CSTE Exhibit Booth; Start planning and production timeline for program/workforce materials and one-pagers	Communications / Dhara / Amanda
April 1		Review list of exhibitor / sponsor payments and registration	Communications / Shelia / Beverly
April 1		Finalized exhibitor and sponsor information for pocket agenda	Communications
DEADLINE – April 1		Workshop start and end times REQUIRED for pocket agenda printing	Program/Workforce Staff
DEADLINE – April 1		Hard Deadline for any final changes to AV, IT, any Equipment or Internet needs for workshops (includes any CSTE equipment where connectivity to AV is required; i.e. CatchBox mics). Breakouts and roundtables have standard sets to max capacity.	Program/Workforce / Beverly
DEADLINE – April 1		CE information for website, app and pocket agenda finalized and submitted to Beverly	Workforce Staff
DEADLINE – April 1		RWJF finalists registered and final entrée selection saved; Deadline for RWJF document information (pictures, abstracts, bios); Coordination with Finance Team on honorarium	Alesha / Shundra / Shelia
DEADLINE – April 1		Final evaluation template prepared for overall evaluation; Program/Workforce staff coordinate with Evaluation staff on workshop evaluation needs and establish timeline for completion.	Evaluation/Program/Workforce Staff / Beverly
DEADLINE – April 1		Finalize equipment needs and laptop set-up with Confex	Beverly / IT

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Week of April 5	x	Send sponsored travelers reminder email for registration and travel	Program Staff / IT / Mone' / Communications
DEADLINE – April 9	x	Deadline for Submission of Late Breaker Abstracts	Beverly
DEADLINE – April 14		Daily Glance Agendas posted to Website	Beverly / IT
DEADLINE – April 15	x	Announce candidate slate to Active members	ED / Communications / Beverly / IT
DEADLINE – April 16		Confirm student scholarship travel and registration	Workforce
DEADLINE – April 16		Talking points and speeches for President-Elect, President & ED (fellowship graduation ceremony, opening plenary, banquet, state of CSTE)	Communications
DEADLINE – April 16		Finalize agenda feeds and information for App	Beverly / IT
DEADLINE – April 21		Late-Breaker Agenda Finalized	President-Elect / Beverly
April 23		Late-Breaker invitation (and decline) letters sent	Beverly / IT
DEADLINE – April 26		Deadline for Active Member eligibility to vote in elections	IT / Membership
Week of April 26	x	Send sponsored travelers reminder email for registration and travel	Program Staff / IT / Mone' / Communications
DEADLINE – April 29	x	Open EB voting for Active Members	IT / Membership / Communications / ED
DEADLINE – April 30	x	Early-Bird Registration	Operations / Accounting
DEADLINE – April 30		Deadline for CE application package	Workforce Staff
DEADLINE – April 30		Communications submit final edited proofs of any program/workforce documents for CSTE booth	Communications / Dhara / Amanda
DEADLINE – April 30		Speaker response to invitation	
DEADLINE – May 5		HARD DEADLINE for any FINAL meeting room seating needs for chairs and tables on Workshops and Position Statement Sessions (Required to submit to Convention Center no later than 30 days from move in or late fees and increased pricing; For Pittsburgh, charges are all)	Program/Workforce Staff
DEADLINE – May 6	x	Post Ordinary Process Position Statements on Website	Meredith / Dhara / IT / Communications
May 6		Review AC at Staff Meeting	Beverly
May 7		Submit Final room sets and F&B to Hotel / Convention Center	Beverly
May 7		Finalized t-shirt order and provide counts by shirt size for registration limits	GSS Staff
DEADLINE – May 7		Order promotional items, tote bags, AC pins and ribbons	Communications / Shundra
DEADLINE – May 13		Tellers confirmed EB voting	Beverly / ED / Kevin
DEADLINE – May 13	x	Deadline for EB voting	IT / Membership
DEADLINE – May 20	x	Open run-off/secondary elections for Active members or if no run off elections then announcement to membership	IT / Membership / Communications / ED
DEADLINE – May 20		Deadline for PDF Sunday agendas for online program and app	Program/Workforce
Week of May 24	x	App announced to attendees	Beverly / IT
DEADLINE – May 24		Close workshops with waitlists and move any waitlists attendees to workshop if space is available. Close all waitlists and adjust registration limits for any available capacity. Program staff communicate to non-accepted waitlist folks.	Program / IT / Shundra
DEADLINE – May 27		Expedited Process Position Statements Due to CSTE	Program Staff / IT
DEADLINE – May 28		Deadline for pertinent speaker changes CE forms	Workforce Staff
June		Apply 2022 AC CE credits so critical dates are identified early	Workforce Staff
DEADLINE – June 3		All Conference Materials Packed, Identified on Load List and Ready for Shipment on AV truck (Tentative as of June 2020 and final date TBD in May 2021)	National Office
DEADLINE – June 3	x	Deadline for run-off/secondary elections	IT / Membership
DEADLINE – June 3	x	Advanced deadline for presentation upload in Confex	
DEADLINE – June 3		Review sponsored travelers and Sunday speakers not registered and provide a list for registration desk to confirm access to Sunday session	Program/Workforce
DEADLINE – June 3	x	Post Expedited Position Statements on Website	Meredith / Dhara / IT
Week of June 7	x	Announce new Executive Board (if run off elections)	ED / Communications / Beverly / IT
Week of June 7	x	Before you arrive Email	Communications / IT
Week of June 7	x	Send reimbursement forms to sponsored travelers	Program Staff / IT / Accounting / Mone'
June 10 and 11		Travel for staff supporting logistics and set up (check with Senior Director)	Operations / Finance
June 11 and 12		Travel for all other staff supporting conference (check with Senior Director)	GSS / Programs
JUNE 13 - JUNE 17		ANNUAL CONFERENCE	Staff attending AC
JUNE 13 - JUNE 17	x	Various social media posts and app alerts	Communications / IT
June 17		Update EB on website (multiple locations) and distribution lists (EO and Full) and letterhead	Communications / IT
June 17	x	Send attendee thank you email w/ evaluation link	Communications / IT
Week of June 21	x	Send reimbursement forms to sponsored travelers (reminder)	Program Staff / IT / Accounting / Mone'
Week of June 28	x	Send moderator and speaker thank you emails	Communications / IT
Week of June 28	x	Send plenary speaker, sponsor, exhibitor, Mann thank you emails/letters	Stephanie / ED / Communications
Week of June 28		Send EB date options for Fall Board Meeting	Stephanie / ED
Week of June 28		Send EB conference call schedule	Stephanie / ED / Communications
June 28 - July 13		All team post-cons reviewed with Beverly; Post-cons completed in timely manner as it may impact site visits and contracts for 2024	Communications / Program / Accounting
DEADLINE – July 8	x	Deadline for attendee evaluation submission	Evaluation / Communications
Week of July 12	x	Post Presentations and announce prize & award winners	IT / Communications / Shundra
Week of August 2		Review evaluation results	Evaluation / Beverly
August	x	Post Position Statements Email to Memberships and Send Letters to Agencies	Meredith / Dhara / IT / Communications