HEA Cohort
Health Equity Summit Series
Project Timeline

SUMMIT SERIES MEETINGS	**DATES**	**TIMES**	**# OF ATTENDEES**
HHRC Meeting	Initial date	2 hours: 1-3 pm	Invite local nonprofit and human service organizations
Community Leadership Training (CLT)	One month after initial date	4 hour workshop: 10-3 pm with lunch hour for networking	Target 30 people
Summit	2 weeks after CLT date if speaker is available	4 hour presentation/ workshop: 1-5 pm with social/ networking hour 5-6 pm	Target 80 people

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PROJECTS	**DUE DATE**	**STATUS**	**NOTES**
	(Set dates once you know meeting dates)	(Note when In Progress vs. Completed)	
Contracts			
Budget determined		Example: Completed	Determine if the grantor permits fluctuations in budget line items as long as overall budget is not exceeded.
Research/secure Summit key note speaker's availability; set Summit date		Example: In Progress	Key step to getting the process started. All other meetings and projects are based on the Summit's date. Be certain date doesn't conflict with CO Nonprofit Conference or any other significant local events.
Hire Event Planner/final contract			Hire independent contractor to assist you as soon as possible. Recommend using Google Drive so that files may be easily shared and updated; keep folders for invoices, contracts, invite lists, project timeline, budget, etc.
Community Leadership Training date/time			
Summit structure and time			
CLT facilitators' final contract			Expect to pay for services and travel expenses.
Summit's speaker's final contract			Expect to pay for services and travel expenses.
Payments			
Meetings Venues			
HHRC meeting venue			
Community Leadership Training venue			
Summit venue			If plan to do live streaming, be certain the venue has solid internet.
Pay deposits			Deposits typically needed to reserve meeting spaces. Determine how the event planner will pay for invoices and items needed with a credit card.
Payments			
Interpreters			
Hire interpreters - ASL (if needed)			Book ASAP as ASL interpreters can be difficult to obtain. Recommend contacting RISP about their free pilot program before contacting any ASL agencies! Will need 2 interpreters for long sessions.
Hire language interpreters - Spanish			Will need 2 interpreters for long sessions.
Confirm arrangements prior to CLT			
Confirm arrangements prior to Summit			
Payments			Expect to pay for services and travel time.
Promo Items			
Research CLT and Summit Series branded schwag items			Promo items can take quite a bit of time to design and produce; recommend starting as soon as venues are confirmed.
Design logo and/or tagline for Summit Series			Share logo files with staff who will need them.
Payments			
HHRC Meeting			
Venue set up			
Notify attendees of date/time/location			
Invite few Community Champions attendees			Exec Dir to assist with reaching out to other nonprofits.
HHRC meeting needs			AV needs, notepads, pens, flipcharts, markers, tape, etc.
AV			Projector, screen, etc.
Payments			
Community Leadership Training Attendees			Note: Draft list in Google drive to build upon
Create flyer and email other nonprofits contacts due date			Email invitation to nonprofits and ask for their assistance to find a few attendees that could be "community champions", who want to be a voice for their community about health equity
Survey to non-HHRC attendees for input			Create an email survey with a platform such as Survey Monkey to determine what topics would be good for the facilitators to cover, demographic information, etc. Will need translated version for Spanish-speaking attendees.

Survey results to facilitators		
Childcare Services		
Hire services		
Pay deposit		
Signed authorization forms signed by families for CLT	Send with babysitters' profiles.	
Signed authorization forms signed by families for Summit	Send with babysitters' profiles.	
Confirm arrangements prior to CLT		
Get cash for CLT tips		
Confirm arrangements prior to Summit		
Get cash for Summit tips		
Payment CLT		
Payment Summit		
Transportation		
CTL	Determine if needed and if the overall budget will allow.	
Summit	Determine if needed and if the overall budget will allow.	
CLT Invitations		
Paper and/or email invite		
Personal phone calls/emails	Some attendees will not have computers and/or emails, so calls/texts will need to be made.	
Summit Invitations		
Grant logos	Determine if the grant requires any logos to be promoted.	
"Save the Date" postcards	Print 100 for staff/event planner to personally distribute.	
Evite	Set up eventbrite.com registration; will need upgraded account (free) to request specifics (dietary restrictions, daycare needs, interpretation services, etc)	
Email Summit reminder and if any pre-workshop assignments by the speaker		
Payment		
CLT Catering		
Menu plan: meal, beverages, coffee, snacks		
Pay deposit		
Food count to caterer		
Payment		
Summit Catering		
Menu plan: meal, beverages, coffee, snacks		
Pay deposit		
Food count to caterer		
Payment		
Incentives		
Buy the goods	Purchase items that would be applicable to anyone to enjoy. (There's money in the budget, so you don't have to ask for donations!)	
Payments		
Note Taker		
Brainstorm potential people		
Develop contract		
Hire person		
Payments		
CLT Prep		
Facilitators' list of needs	Request what additional needs besides those listed in the contract, both AV and supplies.	
Meeting items	Order flipcharts, markers, pens, notepads, tape, nametags, hand sanitizer, kleenex; obtain cash in advance to pay community champions and tip the sitters; borrow flipchart stands and clipboards; bring promo items.	
Venue set up	Call to discuss set up for meeting, registration, and childcare.	
AV	Wireless microphone, PA, projector, screen, etc. Additional table needed for interpreters and beverages/ snacks.	
Signup sheet & payment forms	To pay your community leaders in cash, chances are your auditor will want individual sign in sheets with signature and printed name, and best if you can get their address, email and phone as well. Prep cash in envelopes with attendees' names on them prior to the event. Also prepare an event sign in sheet for all attendees. Suggest alphabetizing the list to expedite registration.	
Prep CLT payment	Cash in individual envelopes with attendees' names on the front.	
Reminder email to attendees	Include schedule of events, daycare info, venue address, parking instructions, etc.	

Event signage	Sign on exterior of building with event name.	
Thanks emails/texts/calls to attendees and vendors		
Key Note Speaker		
Assist with lodging arrangements		
Payment		
Advertising		
Newspaper(s) availability and rates	Determine best dates to advertise prior to Summit.	
Create ads		
Facebook posts		
Payments		
Summit Prep		
Key note speaker's list	Request what additional needs besides those listed in the contract, both AV and supplies.	
Toolkit		
Key note speaker's slides	Need all slides 1 week in advance for translation.	
Venue set up	Call to discuss set up for meeting, registration, and childcare. Additional tables needed for interpreters, beverages/snacks and live streaming.	
AV + live streaming on website	Coordinate with your AV person and web developer to put live streaming on your website.	
Meeting items	Bring previous supplies along with promo items, incentives, raffle tickets, basket for raffle drawing, and tabletop holders.	
Signup sheet & payment forms	Alphabetize the sign up list and add photo opt out column/print; revise date/print more attendee payouts.	
Prep Summit payment	Cash in individual envelopes with attendees' names on the front.	
Photographer	Utilize either the event planner or staff person.	
Reminder email to attendees	Include schedule of events, daycare info, venue address, parking instructions, live streaming, etc.	
Event signage	Sign on exterior of building with event name. Sign at registration about photos/videos. Signage at 2 tables that will not be filmed; mount in plastic table top holders.	
Post Summit		
Thanks emails/texts/calls to attendees and vendors		
Facebook posts to thank attendees and vendors, post local newspaper article		
PR: article in local newspaper		
Final payments	Those expenses in addition to those above: AV, event planner, etc.	
Finalize budget expenditures		
Other Meetings		
Your Next Board Meeting	Prepare a wrap up report or verbal update.	
Next HHRC Meeting	Prepare a wrap up report or verbal update.	