



# Pacific Crest

906 Lacey Avenue  
Suite 206  
Lisle, IL 60532  
phone 800-421-9826  
fax 630-737-0881

## Institute Information and Logistics Checklist

### Host Campus Contact Person

As part of the process of setting up and delivering a Pacific Crest institute, we would like one person from the host school to serve as our main contact person. The contact person is asked to help with the general set-up and preparation for the institute, as outlined in this document. This person should also be available during the institute to help with logistical situations that might occur.

### Down Payment and Cancellations/Changes

Once you have selected dates for the institute, obtain a purchase order which can be faxed or emailed to Pacific Crest. A non-refundable down payment or deposit is required to secure the dates for the institute. Upon completion of the institute, the final balance will be due. Note that cancellation of the institute will result in forfeiture of the down payment. Changing the date for an event (once it is agreed upon) will result in the assessment of a \$2,000 change fee.

**NOTE: Regional Professional Development Centers:** The appropriate percentage of the annual Center down payment will be applied as a credit toward the final balance due for this event. In the case of cancellation of the event, this same down payment amount will be forfeited by the Center. Changing the date for an event (once it is agreed upon) will result in the assessment of a \$2,000 change fee.

### Marketing (Flyers and Web)

We list all institutes on our website and like to offer a 1- to 2-page electronic flyer with details (date, times, location, contact person, learning outcomes, focus areas, facilitator information, registration details, etc.) for each institute as well. When you schedule an institute, we will send you a generic flyer than you can mark up and fax or e-mail back to us. We will then customize it to suit your particular needs. The specifics of your institute (the details listed above) should be given to Pacific Crest with 48 hours of institute downpayment. We will post the flyer for your institute on our website and send you a copy as well. You are welcome to further distribute that flyer as you like (print and post, or e-mail as an electronic file).

**NOTE: Regional Professional Development Centers:** Your institutes will be listed on your RPDC website. All flyers and web-based information will appear there. You are welcome to further distribute any flyer from your RPDC website as you like (print and post, or e-mail as an electronic file).

### Number of Participants

As a general guideline, institutes can accommodate up to 50 people (or 15 teams for team-only events), including facilitators and mentors. Use a waiting list in situations when you approach the participant limit, as there are usually some cancellations.

**NOTE: Team-ONLY Institutes:** As a general guideline, Course, Program, and Activity Design Institutes can accommodate a maximum of 15 teams. Use the Teaching and Learning Center (TLC) or a similar committee, along with academic affairs, to promote the event and help select the academic teams that will participate. This strategy promotes the TLC and lends credibility to the process so that it is not perceived as being only an administrative initiative. We suggest that you ask each program/department/course to identify 1) a team of three to five participants (plus an alternate), 2) a contact person, and 3) a brief statement of purpose for attending the institute.

## Participant List

Create a list of all participants which includes the following information: full name, title, discipline or department, institution, phone number, and email address. A template is available at ([www.pcrest.com/roster.doc](http://www.pcrest.com/roster.doc)). Send the participant list (via email) to Pacific Crest *at least one week prior to the event*. Email: [demetria@pcrest.com](mailto:demetria@pcrest.com)

*At the end of the institute*, provide a “final” participant list that can be distributed to each participant, the facilitators, and Pacific Crest. This document is helpful for networking purposes and provides documentation used for the final billing of the event.

## Administrative Support

We recommend that you invite the academic leadership to participate in any institute. We recommend that you to make arrangements for them to observe the first hour and half (on the first day) and the last hour on the final day, if full participation is not possible. Asking someone to make opening remarks and introduce the facilitator or facilitation team is always a nice touch.

## Name Tags

We ask that the host institution provide name tags and/or tents with large print for the participants that are available at the start of the institute. We suggest using 4-inch by 3-inch plastic badge holders with lanyards. Note that adhesive name badges are a possible alternative. A template for creating name badges is available on the Pacific Crest website: ([www.pcrest.com/nametags.doc](http://www.pcrest.com/nametags.doc)).

## Pre-institute Preparation

### Pre-institute Reading and/or Activity

Participants are expected to have completed a pre-institute activity and/or readings no later than 48 hours prior to the start of the institute. The pre-institute activities and readings are all available on-line. We will notify you of the exact URL no later than 1 week prior to your institute. The activity takes approximately one to four hours to complete. The contact person is expected to notify participants about the specifics of the event (location, starting time, and preparation) a week to ten days prior to the event.

### Notification of Event Specifics

The contact person is expected to notify participants about the specifics of the event (location, starting time, and preparation) a week to ten days prior to the event.

### Shipping Address

The contact person will make arrangements for receiving institute materials shipped by Pacific Crest. Please provide a physical shipping address (no PO boxes) where event materials can be sent via FedEx or UPS. When event materials are shipped, an e-mail notification of the shipment tracking number will be sent to the Campus Contact Person.

### Pre-institute Meeting

A meeting (or a phone call if a meeting is not possible) with the campus coordinator, at the location the event will be held, prior to the start of the event is essential. The purpose is to discuss any issues relating to campus culture, the dynamics of individual personalities on the various teams, or any other information the coordinator feels is important to share with the facilitator.

## Food and Refreshments

The host institution is responsible for providing a light breakfast, lunch, and refreshments for participants. Consider the campus food service as a possibility. If there are participants who are not from the host institution, Pacific Crest will pay their associated food costs.

**NOTE: Regional Professional Development Centers.** As stated in the Letter of Understanding, Pacific Crest will pay for the cost of food and refreshments. However, the Center is responsible for making the arrangements and keeping the costs within the stated budget.

Following are the suggested food arrangements:

- Morning refreshments should be available 15 minutes prior to the starting time each morning. Include coffee and juices, along with muffins, bagels, or donuts. Provide enough to last through the morning or arrange for a refill between 10:00 and 10:15 A.M.
- Provide lunch at Noon. Sandwiches and salads are fine. *Avoid having the same lunch all three days. Also, lunches should not be served or eaten in the same room as the general meeting room.*
- Provide afternoon refreshments at 3:00 P.M. Include water, soft drinks, and possibly cookies.

## Daily Schedule

The host institution may determine the starting and stopping times each day. Pacific Crest recommends the following daily schedule:

8:00 a.m.	Starting time each day
10:00 - 10:15 a.m.	Morning break
12:00 - 1:00 p.m.	Lunch break
3:00 - 3:15 p.m.	Afternoon break
4:30 - 5:00 p.m.	Ending time (earlier on the last day, such as 4 PM)
5:00 - 6:00 p.m.	Special consultations may be arranged by/with the facilitator

## Set-up the morning of the first day

The facilitator will need access to the meeting room approximately an hour prior to the start of the institute on the first morning (and possibly subsequent mornings). Materials will need to be distributed and final preparations made for the start of the event.

**NOTE: Teaching Institutes ONLY:** At most institutes, mentors will assist the facilitator in working with participants. Mentors are those who have previously participated in at least one institute. A meeting with the facilitator and the mentors should take place either the night before or at 7:00 A.M. prior to the start of the institute. All host school mentors should attend this meeting.

## Meeting Room

The main meeting room should be a conference room or classroom that is large enough to comfortably seat the expected number of participants. It is important that the room have tables (preferably round tables but rectangular will do) that seat at least six people. The room should have whiteboards and markers. Otherwise, a large portable whiteboard should be available. There also should be a couple of extra tables that can be used by the facilitator for display purposes.

## Equipment Needs

The required pieces of equipment include:

- (1) a computer projection system (the facilitator will bring a laptop computer)
- (2) large screen
- (3) access to the Internet
- (4) access to or availability of a laser printer (either in the room or nearby)
- (5) flip charts for teams to use

Set up a Blackboard™ or comparable course management system site with the lead facilitator as the Teacher/Instructor and assign all participants the status of “Teaching Assistant.”

We strongly recommend that **all** participants have a laptop for their use during the institute. One laptop computer must be available per team for the sharing of files. Participants are encouraged to bring a memory stick or thumb drive as well.

**NOTE: Teaching Institutes ONLY:** A popular institute activity is a “live” classroom situation where the Pacific Crest facilitator works with a group of students. This enables participants to observe many of the Process Education principles and techniques in action. This **two-hour activity** is best scheduled just after lunch on the second day of the institute. Students can either be recruited for this session or preferably, with the permission of an instructor, a regularly scheduled class can be used. If students are recruited, aim for 30 students.

### Participant Assessments

At the end of the institute, participants will complete an online institute assessment form that allows them to provide feedback about their experiences. Pacific Crest will receive the assessment data electronically and compile and share this data with the host institution.

### Binder/Handbook Labels

Pacific Crest will print a cover sheet to be inserted into the institute handbooks (typically in a binder format). Please indicate if you would like the cover to be customized for your event. Custom information for the binders or handbooks should be shared with Pacific Crest at least 2 weeks prior to the start date of your institute.

Custom information may include: the dates, the location, hosted by..... or sponsored by.....

### Lodging Arrangements

Help with setting up lodging arrangements (starting with the night prior to the start of the institute) for the Pacific Crest facilitator(s) might be necessary. Discuss the situation with a Pacific Crest representative.

If participants from other institutions require lodging, we ask your help in providing information about the available lodging options.

