

Preparation Checklist

Water System Partnerships Workshop

This preparation checklist will serve as a starting point in the planning process. Organizers and facilitators should add items to this checklist to prepare for the workshop and maintain communication with attendees after the workshop. Some items below are only applicable if the training is held in-person.

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| **5 to 6 Months in Advance** | **4 to 5 Months in Advance** | **3 to 4 Months in Advance** | **1 Month in Advance** | **1 Week in Advance** | **Workshop Day** | **After the Workshop** |
| *Initiate the Workshop Planning Process*  Decide to host a workshop  Download the Water System Partnerships Training Toolbox  Define workshop goals and objectives  Determine invitees  Assemble a planning committee  Hold first planning call | *Determine Event Logistics*  Determine location, date, and facilitator(s)  Develop invite list  Identify AV logistics needs  Organize catering  Create an agenda  Visit the venue  Draft a schedule  Brainstorm networking options  Hold planning call | *Promote the Workshop*  Send Save-the-Date  Develop registration questions  Create registration site  Customize and post flyer  Apply for CEUs  Send invitation  Monitor registration  Confirm onsite support  Hold planning call | *Prepare Materials*  Agenda  Slide deck  Sign-in sheet  Name tags and table tents  Resources guide  Exercise worksheets  Feedback forms  Participant packet  Hold planning call | *Final Planning Logistics*  Close registration  Send reminder to attendees  Hold final planning call    *Print Materials*  Name tags and table tents  Sign-in sheets  Participant packets  Speaker’s notes  On-site registration sheet | *Room Setup*  Table and seating format  Easel, flipchart, and markers  Check-in table    *AV Logistics Setup*  Laptop and charger  Projector (i.e., HDMI or VGA chord)  Screen/display  Microphone  Remote clicker | *2 Weeks After Workshop*  Collect, compile, scan, and send all feedback forms to EPA  Collect and send registration report and attendee report to EPA  Send Thank You email    *2+ Months After Workshop*  Send Follow-up email  Conduct additional follow-up actions  ☐ |