

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.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **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 ☐ |