Remote Workshop Coordination Checklist

Workshop: _____   Schedule: _____

Facilitator(s): _____   Start Date: _____

Moderator: _____   End Date: _____

When facilitators are assigned to a workshop, they become responsible for ensuring that all the steps below take place. Please coordinate and communicate with other staff members as needed.

Timeline	Staff		Actions
Ongoing	Callers	□	Contact partner organizations to offer and/or introduce our workshops
		□	Provide partner organizations with flyer and contact information to distribute to their clients/residents/listservs so interested individuals can reach out.
		□	Register individuals for workshops
		□	Send confirmation emails to registered individuals with Zoom instructions attached (as needed)
-4 weeks	Directors	□	Assign facilitators/moderators/platforms
	Facilitator(s)	□	Create a Workshop Coordination Checklist for your workshop
		□	Schedule blocks of time on your calendar to do survey calls 2 weeks before the workshop begins
		□	Check your moderator's calendar to schedule blocks of time to do setup calls one week before the workshop begins and invite your moderator
		□	Schedule a block of time on your calendar 1 business day before the workshop begins to do reminder calls
	Moderator	□	Set up events on the appropriate platform for the workshop. Invite facilitator(s)
-3 weeks	Facilitator(s)	□	Add workshop to tracking system
-2 weeks	Director	□	Mail materials (CDSME + Zoom instructions)
		□	Complete pre-program survey calls with callers
-1 week	Facilitator(s)	□	Complete setup calls
	Moderator	□	Be on standby during setup calls to help if needed
-1 day	Facilitator(s)	□	Complete reminder calls

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During workshop	Facilitator(s)	□	Take attendance and facilitate using appropriate materials
		□	Bingocize: Email Director a list of Bingocize winners (name, address, number of wins) at the end of each week
		□	In the final session announce the name (and phone number, if appropriate) of the person who will contact participants for a post-program survey call.
	Moderator	□	Troubleshoot tech problems and call out to participants who do not join on time
	Directors	□	Bingocize: Coordinate with donors to mail prizes weekly
		□	Assign callers to complete post-program survey calls before last session
+1 day after workshop ends	Facilitator(s)	□	Create and distribute certificates via email or mail.
+1 week after workshop ends	Callers	□	Complete post-program survey calls.

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