

**Workshop Coordinator’s Checklist**

# **Workshop Coordinator Responsibilities**

The administration of logistics for the planning and fellowship workshops is a key factor in their success. The Workshop Coordinator’s overall responsibilities may include the following:

* Schedule the workshops, in consultation with the Sponsor and the workshop coach/facilitators
* Secure meeting facilities, accommodations & meals for the workshops
* Maintain a list and email addresses of all participants; send out announcements, homework assignments and workshop information to participants
* Work with facilitators to assemble workshop notebooks and materials (provided by coach/facilitators)
* Make sure meeting room is set up, equipment functioning, and workshop materials available
* Coordinate with host sites on field trip arrangements

### Organizing the Program

* Obtain workshop date windows and names of project(s) from Sponsor
* Obtain initial list of participants from Sponsor and/or coach
* Create contact list of participants, including addresses, phone numbers, organizational affilitation and email
* Determine tentative site location of initial workshop
* Secure date commitments from sponsor, facilitator and participants
* Identify budget center for managing expenses and transfers
* Email any logistical information as well as agenda, homework assignments to all participants (provided by coaches)
* Provide estimated number of participants to the facilitator, at least one month in advance of the first workshop.

### Meeting and Logistical Arrangements -- Prior to Each Workshop

* Review *Meeting Facility Checklist* and email checklist to local staff contact. Locate good meeting facility and lodging.
* Reserve dates, tentative number of lodging rooms, meeting room, dining or catering. Negotiate contract. If possible, set up direct billing. If available, get brochures and maps to send to participants.
* Contact restaurants (on-site or off-site) or caterer to reserve dates, discuss tentative number of people attending and menu ideas. Set up direct billing, if possible. If not, the sponsor or coach/facilitator can pick up bill for reimbursement.
* Obtain logistical information (site directions, local weather, time zone, etc.) to send to participants
* Identify field trip, working with local project staff – see *Field Trip Checklist*
* Develop draft agenda with Facilitator, including starting and ending times

**Communications with Participants -- Prior to Each Workshop**

* Email the appropriate homework assignment (the facilitator will provide a homework recap after each workshop)
* Email basic logistical information, including:
* Workshop start/finish times
* Airport location(s) *please be sure to indicate time zone is different from meeting site*
* Meeting location and accommodations overview
* Field trip overview
* Request for any special dietary and A/V needs
* Secure any team homework materials from team leaders prior to workshops (coach/facilitator will inform you of what to expect.)
* Forward copies to Coach/Facilitator or put in shared file

**Materials for Workshops**

* Work with coach/facilitator as needed to produce workshop materials (agenda, copies of presentations, workshop aides, breakout instructions, copies of handbooks, etc.

**Audiovisual & Equipment for Workshops**

# A/V and equipment may be provided by local office and/or meeting facility. See Meeting Facility checklist for further details.

* LCD Projector -- Critical ***equipment item. Please have plan for backup in event of any problems.*** *Multiple projectors are desirable, if available.*
* Cart(s) or table for the above
* Screen
* Extension cords and power outlets for each project team & LCD projector
* Name tags (2”x 4” address labels work fine)
* Flipchart, colored markers; masking tape/push pins
* Access to copier and/or printer (if available)

**Food and Beverages for Workshops**

If possible food & beverage stations should be set up directly in the meeting room. **Please make sure to provide the “fuel” all day throughout the workshop sessions:**

* Coffee, decaf coffee, tea, and herbal tea (sugar, sugar substitute and creamer)
* Bottled water, soft drinks, assorted juices
* Snacks all day. Select healthy snacks. Try not to have too much sugar and pastries. E.g. Luna bars, granola bars, fruit, nuts, chips/pretzels, cheese tray)

Meals

* Hot breakfast is strongly preferred; protein helps keeps everyone’s energy levels high. However, if a continental breakfast is the alternative, please include whole grain cereal and yogurt**,** along with pastries or bagels, fresh fruit and of course coffee, tea, water and juices.
* Meals should include a vegetarian choice & assorted beverages
* Provide boxed lunches with beverages on the day of field trip and last day for return travel