

## **TRAINING EVENT ORGANIZATION CHECKLIST**

### **Book Dates**

- Research to choose best dates - check with the following to avoid choosing dates that conflict with major events in the community:
  - Chambers of Commerce
  - Tourism Associations
  - Colleges / Universities
  - Sports teams schedules
  - Company contacts
  - Potential facilitator(s)
- Review the facilitator's contract to determine total hours required
- Confirm facilitator(s)

### **Communicate Dates to:**

- Facilitator
  - Send trainer purchase order (PO) to facilitator
- Internal/external stakeholders

### **Book Location**

- Review notes on previous locations used - if positive, book same location
- If a new location is necessary, solicit feedback from:
  - Facilitator
  - Company contacts
  - Chambers of Commerce
- Ensure room can comfortably hold the number of expected participants
- Fax room set-up picture to facility manager
- Ensure facility has the equipment facilitator will need, or send equipment with facilitator
- Ask for water service in the room and that the cost be included in the room rental

### **Begin Marketing**

- Review Marketing Plan and contract(s)
- Submit newspaper ads (if appropriate)
- Call potential Marketing contacts and ask for leads on participants
- Send Marketing materials (Informational Letter / Posters / Flyers) to:
  - All Marketing Contacts
  - High Schools
  - Friendship Centres
  - Radio stations
  - Churches / Youth Groups / Mom's Groups
  - Chambers of Commerce
  - Colleges / Universities
  - Other Community Contacts
  - Employment Centres
  - Other Community Centres

### **Registrations**

- ❑ Call facilitator about 3-4 days before the workshop begins
  - ❑ Remind them of the course dates
  - ❑ Ask if they have any questions
  - ❑ Update on number of participants expected
- ❑ Ensure facilitator has been sent participant materials
  - ❑ Send attendance list with course kit
  - ❑ Send "facilitator notes" with kit (gives them details of workshop and reminds them of "business" to be taken care of)
    - ❑ Workshop dates, times, locations, speakers, registrations
- ❑ Call all participants
  - ❑ 2-3 days before course begins, call all of the registered participants

### **Book Speakers**

- ❑ Send "speaker letter" to all speakers you book
- ❑ Ask speakers if they have any questions about their presentations
- ❑ Call speakers 1-2 days before they're due to speak to remind them and ask again if they have questions
- ❑ Send thank you cards to speakers after the event and note in data base
- ❑ "Flag" speakers in data base and add notes to include feedback from facilitator regarding speakers' "performance"

### **As Workshop Progresses**

- ❑ Call participants to remind them of each session, unless the dates are consecutive
- ❑ Ask facilitator to call you the day after each session to:
  - ❑ Provide feedback on workshop - participants, materials, location, etc.
  - ❑ Provide feedback on speakers, so you can enter this information into data base
  - ❑ Fax attendance list
- ❑ Add notes in data base about each participant as to attendance and any other feedback the facilitator provides

### **After Workshop Ends**

- ❑ Ensure all POs have been sent and all invoices have been received
- ❑ Ensure all expenses have been accounted for
- ❑ Ensure thank you cards were sent to all speakers and anyone else who helped out significantly and that notes indicating this are made in the data base
- ❑ Ensure speakers' notes are updated