



WORKSHOP COORDINATOR CHECKLIST

WORKSHOP TOPIC

COORDINATOR(S)

WORKSHOP DATE

GETTING STARTED & ROLES

Meet with other coordinators for the first "brainstorming" meeting. Determine important issues regarding the workshop topic that should be addressed and presented at the workshop, i.e. Water Day: drought, current state of affairs regarding water; something of interest to the class members.

Determine what role each coordinator will play and delegate responsibilities for the various aspects of the day (be sure to exchange current contact information with one another).

When appropriate, identify a non-profit organization that is either one of the presenters of the day or an organization that is affiliated with the topic and would benefit from class member participation.

Leadership Tomorrow is a non-profit and we work very hard to deliver an outstanding experience while trying to be as economical as possible. In planning your budget, if your anticipated expenditures exceed more than 10% of what was spent last year on the workshop, approval will be needed by the Executive Committee. You can check with Jeff Parker at jparker@newportbeach.com for expense totals.

UNDERWRITING

Try to get each of the following items underwritten:

- AM Location
- PM Location
- Lunch
- Transportation
- Any parking fees

AGENDA

Draft outline for the day (use the LT Agenda template).

Reminders

- Start no earlier than 8 am and try to end by 4 pm.
- Allow participants to be active learners as well as passive recipients of information.
- Allow time for Q&A between class and speakers.
- Plan breaks between panels and several speakers.
- Confirm time for the photographer to join and take pictures.

- Allow for necessary travel time between venues. It is suggested to drive the route ahead of time to help anticipate any issues, timing, etc.
- Provide a few minutes for lunch sponsor to share with class about the business.
- Allow time (at least 5 minutes) at the end of the day for LT Connections, Evaluations, and wrap up with Catalina.

LOCATIONS

Identify location(s) for the day.

Check location(s) personally (checking for adequate lighting, restrooms, air circulation, and comfortable seating).

Obtain maps and directions to all locations. Receive instructions regarding parking or any traffic issues.

SPEAKERS / PRESENTERS

Identify the subject and speakers.

- Choose individuals who are outstanding leaders in their field.
- Try to obtain the highest ranking or best-known person you can find.
- Identify individuals who received an excellent evaluation in past LT workshops.
- Rule of thumb: no more than 3 or 4 on a panel.
- Invite speakers/presenters to join the class for a meal.

Confirm speakers as soon as they agree to speak.

- Send a confirmation email.
- Obtain a biography and current contact information regarding the speaker; LinkedIn/website.
- Determine if the speaker has any special requests for equipment or tools, such as PowerPoint.

Spend time with the speaker (in person, email, or by Zoom) to focus on the purpose of the presentation & timing.

- Acquaint the speaker to LT's mission/purpose if they have not presented for the group before.
- Go over timeline, set up, Q&A, and any other items pertaining to the speaker's presentation.

Panel: determine how you will facilitate the panel and who will moderate.

- Round robin questions.
- 15 minutes each.
- Inform panelists who else will be on the panel with them.
- Determine questions you will ask the panelist(s) and provide the questions to them in advance.

Send speakers a thank you note immediately after the workshop. Feel free to write your own note — a template is available for those who would like assistance (see Thank You Letter template).

MEALS / SNACKS

Limit breakfast to coffee, water, muffins and fruit (unless organization would like to provide breakfast).

Determine lunch. Make sure it is conducive to the situation (i.e. in a park, perhaps boxed lunches).

Check with class liaison to find out if there are any special nutritional needs among class members.

NON-PROFIT CONNECTION

Identify a non-profit organization that is either one of the presenters of the day or an organization that is affiliated with the topic and would benefit from class member participation.

FINAL DOCUMENTS TO CLASS LIAISON

Once the Agenda is completed, send it to Class Liaison Catalina Roger, Catalina_Roger@outlook.com, and Jeff Parker, jparker@newportbeach.com, as an attachment in an email (preferably by the first Monday of the month).

Lead: provide the following materials to Class Liaison by the first Monday of the month of your workshop

Final Agenda.

- Use LT standard format.
- Include a quote related to the subject.

Resource List — provide all verified information for workshop coordinators, speakers, and locations. Include name, title/role, link to a website, LinkedIn, etc.

Biographies of speakers. If there are any recent articles about a speaker, send a link to the LT Class Liaison.

Handouts you would like emailed to the class.

Final speaker packet should include:

- Confirmation letter.
- Information on LT (brochure or link to LT site).
- Agenda.
- Map.
- Class member list (upon request from speaker).

Final class member packet should include:

- Cover letter (from class liaison).
- Agenda.
- Resource List.
- Map.
- Any special instructions.

Thank you for your hard work and dedication to making Leadership Tomorrow the very best organization committed to developing “vibrant, dynamic citizens who are engaged, well-informed, and working together to make a positive impact in their community.”

Leadership Tomorrow Executive Board & Class Liaison

To cultivate, inspire, connect, and empower an effective community of leaders.