

Check List

| ☑ | Task | Comment |
| --- | --- | --- |
|  | Get volunteers / credit unions | Suggested activities for all credit unions: donate door prizes, help promote/advertise the event, attend the event if possible, share in any costs not covered by grants and the foundation.Coordinator role: Arranges site, catering (breakfast, coffee, water, lunch); Leads the conference calls. Preps the site the day before. Pulls together the notebook with all handouts and the SOLs.Educator Liaison: Communicates with the Virginia Department of Education to see if date is okay, then arranges certification points, designs certification form (to be signed by VA DoE and the Foundation )Emcee: Keeps the workshop day moving smoothly, introduces speakers, helps registrants feel welcome.Marketing Assistance: Designs registration form and/or agenda, certification points certificate, and workshop evaluation form. (See samples.)Site assembly team: Meets the day before to set up room and assemble notebooks & goodie bags (if applicable)Speaker role: Prepare session, deliver hand outs |
|  | Hold initial meeting | Assign volunteer duties: Who will do the roles listed above?Decide a dateDiscuss possible venues (Try to pick a CU-neutral location) |
|  | Run the date by VA DoE | The Educator Liaison will make sure the date works with the Virginia Department of Education |
|  | Hold 2nd meeting | Venue is finalizedFlesh out agenda (See sample) with suggested speakers and subject matter expertsAssign volunteers to contact speakers that are not present on the call. |
|  | Speakers are finalized | Volunteers to work with Marketing Assistant & the Speaker Contact on finalizing session times. |
|  | Arrange Certification Points for Educators. | Education Liaison then sends email to Virginia Department of Education to arrange for certification points (See Sample Email).  |
|  | Design Agenda / Registration Form (See sample) | All credit unions should forward a camera-ready version of their logo to the Marketing Assistant Volunteer |
|  | Registration is opened, promotion starts | All credit unions distribute the registration form to their education contactsEducation liaison asks Virginia DoE to put it on the Educators' ListServ |
|  | Registrations confirmed | Coordinator sends out a confirmation welcoming the educators to the workshop along with agenda and site information. |
|  | Speakers Give Handouts to Coordinator | Coordinator collects handouts that need to go into the notebook. Copies are printed. |
|  | Catering Arranged | Coordinator arranges food and beverage for the day. Invoices can be sent to the League or can be handled by the credit union to be reimbursed later.  |
|  | Turn in Door Prizes Gifts for Goodie Bags | If goodie bags are being prepared for the teachers, all credit unions should give their goodies to the coordinator at least a week prior to the workshop |
|  | Site Prep | The day before the event, the coordinator and other volunteers meet to assemble the room (classroom style) assemble notebooks, and goodie bags. Notebooks should contain: RME Notebook Cover, Coversheet, EPF SOLs, Contact info for all sponsoring credit unions, presentation handouts.  |
|  | Workshop Day | Show time! Bring gift cards and/or other door prizes if you haven't already sent them in. |
|  | Post Workshop | Fill out report (see sample) and turn in to the League |