

Example Planning Checklist

For a Community Leader Training Online

3 months out from Event

- Confirm dates with potential trainers/facilitators (partners) for online event
 - We recommend at least two separate days, so that any one training day isn't too long
- Test run potential meeting platforms (Google Meet, Zoom, Teams, etc.)

2 months out from Event

- Prepare the simple webform for the next round of applications (like Google or Microsoft Forms, Survey Monkey, etc.) and include an auto-reply for enrollment with meeting platform details (like a Zoom link) and any other basic details about the event
- Create recruitment advertisement
- Create Facilitator Agenda and send to partners for feedback
 - And set date to go over agenda and test run presentations and online tools
- (if this timeline overlaps with last week in February) Send out a note to partners to advertise during week of National Invasive Species Awareness Week
- Send an email to anyone who expressed interest in the training prior to this round of advertising
- Share out recruitment advertisement across your networks, and ask partner organizations to do the same

1 month out from Event

- Accepting applications, and send out notices on a rolling admission once 8-10 apps have come in
- Prepare digital resources
 - Experiences such as menti, padlets, polls, online commitment form submission, etc
 - [Create plant ID pages](#) to assign each participant for their solo exploration activity
 - Create Volunteer Commitment Form/model release and email to participants

Week/Day of Training Event

- Send reminder emails to accepted applicants and to partners (about 1 week out)
 - Reminder about link to resources page
 - Include commitment forms and model release, they can send back
- Download list of participants for attendance
- Hold event (Day 1)
 - Keep record of attendance, moderate chat and facilitate small group work
- Send follow-up email 2 days later
 - Solo Exploration assignment
 - Links to everything from Day 1
- Hold event (Day 2)
 - Keep record of attendance, moderate chat and facilitate small group work
- Follow up with congratulations for completing and thank you to Volunteers
 - Send commitment forms and model release, and the evaluation link
- Close the loop
 - Save completed volunteer forms
 - Debrief with facilitators and trainers
 - Send Thank You notes to facilitators and trainers

Example Planning Checklist

For a Community Leader Training In-Person

3 months out from Event

- Confirm a date with potential trainers/facilitators (partners) for event, including a date for a follow-up ID workshop
- Reserve event space

2 months out from Event

- Prepare the simple webform for the next round of applications (like Google or Microsoft Forms, Survey Monkey, etc.)
- Create recruitment advertisement
- Create Facilitator Agenda and send to partners for feedback
- (if this timeline overlaps with last week in February) Send out a note to partners to advertise during week of National Invasive Species Awareness Week
- Send an email to anyone who expressed interest in the training prior to this round of advertising
- Share out recruitment advertisement across your networks, and ask partner organizations to do the same

1 month out from Event

- Accepting applications
- Send out notices on a rolling admission once 8-10 apps have been received
- Prepare resources for activities
- Create Volunteer Commitment Form/model release and email to participants
- Create an online evaluation form for participants
- Send reminder emails to accepted applicants and to partners

Week/Day of Training Event

- Send reminder emails to accepted applicants and to partners (about 1 week out)
- Download list of participants for attendance
- If applicable, purchase food the day before
- Set up event space (if possible, day before)
- Hold event
 - Keep record of attendance
- Send congratulations, volunteer commitment form, and evaluation link to participants
- Send Thank You notes to facilitators and trainers