



Pre-Workshop Checklist and Participant Recruitment Plan

The Health Promotion team at AgeOptions is thrilled to have you as a partner and is eager to provide you with the tools needed to deliver a successful workshop. Here is a checklist to provide general guidance for steps that will help keep the implementation of your workshop on track. Check it out!

8 Weeks Prior to Workshop		Date: _____
Action	How do I do this?	
<input type="checkbox"/> Schedule an information session for your community members (optional)	An information session (Class Zero) introduces potential participants to workshop topics. Talk to your Community Health Worker (CHW) about scheduling one and include this when you complete the Workshop Scheduling Form .	
<input type="checkbox"/> Identify and reserve space for a workshop; schedule for 7 weeks	CHW can provide you with guidelines and requirements for identifying or creating the best workshop environment.	
<input type="checkbox"/> Register your workshop with AgeOptions	Use the online Workshop Scheduling Form found at this link: https://ilpathwaystohealth.wufoo.com/forms/m119ko001bauim3/ Contact your CHW or another Health Promotion Team member if you need assistance.	
<input type="checkbox"/> Create a participant recruitment plan	The reverse side of this form offers a Participant Recruitment Plan template . Work with your CHW to devise a strategy that works best for you and your organization.	
<input type="checkbox"/> Obtain promotional material(s)	Flyers are available upon request.	
6 Weeks Prior to Workshop (sooner whenever possible)		Date: _____
Action	How do I do this?	
<input type="checkbox"/> Display and share marketing materials	Refer to your participant recruitment plan to ensure you have the marketing materials that work best for your organization.	
4 Weeks Prior to Workshop		Date: _____
Action	How do I do this?	
<input type="checkbox"/> Check participant registration numbers	There is a minimum participant registration requirement. Refer to your participant recruitment plan or get in touch with your CHW if you have questions.	
<input type="checkbox"/> Communicate recruitment challenges with Community Health Worker (CHW)	Do this through an email, phone call or follow up meeting. Whatever works best for you!	
2 Weeks Prior to Workshop		Date: _____
Action	How do I do this?	
<input type="checkbox"/> Check participant registration to ensure there are at least 8 registered	Refer to your participant recruitment plan or get in touch with your CHW if you have barriers to meeting this goal.	
<input type="checkbox"/> Confirm that there are no conflicts with workshop space	Verify dates of each of the 6 sessions (which can be found in your workshop registration confirmation email) and compare to your organization's room reservation system or calendar.	
Day of 1st Workshop Session		Date: _____
Action	How do I do this?	
<input type="checkbox"/> Confirm total participant attendance numbers	There must be at least 10 people registered and at least 7 people present at Session 1. New participants can join the workshop during Session 2, but no new participants can join after Session 2 .	



Participant Recruitment Plan Template

Pre-Workshop		
Strategy	Action	Things Required
<input type="checkbox"/> Create an informational table		
<input type="checkbox"/> Host an "Information Session"		
<input type="checkbox"/> Promote at monthly gatherings or lunches		
<input type="checkbox"/> Include information in your newsletter		
<input type="checkbox"/> Share on your Facebook page and/or ask to have shared on AO Take Charge page as well		
<input type="checkbox"/> Direct those interested in more information to the Illinois Pathways to Health website		
<input type="checkbox"/> Offer to have healthy snack or meal		
<input type="checkbox"/> Run the Take Charge video on TVs in lobbies, waiting or community rooms		
<input type="checkbox"/> Find patients, clients or community leaders that can act as ambassadors for the program		
<input type="checkbox"/> Engage local fraternal, social or philanthropic groups		
<input type="checkbox"/> Send or have AO send your registered participants a welcome letter with workshop details		
Finishing Touches		
Strategy	Action	Things Required
<input type="checkbox"/> Take a picture of your workshop graduates		
<input type="checkbox"/> Have a program/center manager or administrator acknowledge the graduates at the last class		

Partner Signature

Community Health Worker Signature

Date