

## Workshop Planning Checklist

### Recommend for Lutheran congregations/institutions

If you would like to recommend the workshop as a resource to leaders within a Lutheran congregation or institution, follow these steps:

- Schedule a recommendation meeting to present the resource. Invite appropriate individuals to work out details.
- Determine appropriate Thrivent Financial contacts to help implement.
- Customize appropriate Compliance-approved Recommendation PowerPoint presentation and download.
- Prepare recommendation meeting agenda.
- Confirm meeting time and place, and estimate attendance.
- Assemble materials for recommendation meeting. At least 10 business days before the recommendation meeting, order/download enough of the following materials for those attending the meeting:
  - A copy of the workbook to show and give to the decision-makers.
  - Fact sheet: Written specifically for pastors, church council members and Lutheran institution leaders.
- Hold recommendation meeting. Gain a sense of commitment to hosting the workshop; gain agreement on roles and responsibilities, timelines, goals and minimum number of registered people needed in order for the workshop to be effective. (Recommended group size: 8-10 people minimum.)
  - Clarify roles and responsibilities of congregation/Lutheran leaders and Thrivent Financial contacts.
- Send a follow-up letter that outlines key points of discussion and next steps.

**Date Completed:** \_\_\_\_/\_\_\_\_/\_\_\_\_

### Plan/Implement\*

**4-6 weeks before the workshop:** \_\_\_\_/\_\_\_\_/\_\_\_\_

- Determine workshop date, time and place.
- Set the deadline for registering at least 10 business days before the workshop. (Provide registration/attendance form, found on FieldNet, to appropriate individual.\*)
- Select most appropriate market based on target audience and location. Use CDS to create target market or complete invitation template on Express Marketing. Please be sure to check the Do Not Mail list.
  - Order invitations through Fleximail.
  - Send out invitations and make personal calls to encourage attendance. Please make sure these phone numbers are being checked for Do Not Call list if they have not requested to be contacted. Follow Call-Mail-Call approach script for workshop.
- Begin promoting workshop:
  - Download and complete promotional items.
  - Order and place posters in high-traffic areas.
- If working with a congregation, notify the Thrivent Financial congregational coordinator and the Lutheran community services specialist of the workshop.

**2-4 weeks before the workshop:** \_\_\_\_/\_\_\_\_/\_\_\_\_

- Determine if refreshments will be served, and make arrangements.
- Arrange for a computer, PowerPoint projector, screen, audio equipment and podium, if needed.
- Ensure you have necessary supplies: nametags, flipcharts, markers, tape, pens and attendee form, if needed.

\*Some steps may not be necessary if the church is helping facilitate registration and promotion.

- Determine how many people are registered for the workshop. (Obtain the completed registration form from the congregation/Lutheran institution.)
- Continue calling those you mailed if you have not received a response. Please make sure these phone numbers are being checked for Do Not Call list if they have not requested to be contacted.
- If you have reached the minimum number of participants, order the workbooks.
- To ensure timely delivery, your order must be placed at least 10 business days prior to the workshop.
- Practice and make sure you are comfortable with the workshop material.
- Confirm set-up time with facility.

**2-3 days before workshop:** \_\_\_\_/\_\_\_\_/\_\_\_\_

- Follow up with those who responded 'Yes' to give them a reminder.
- Confirm refreshment arrangements, if providing.

**Day of the workshop:** \_\_\_\_/\_\_\_\_/\_\_\_\_

- Arrive early and meet with contact person to ensure set-up is complete.
- Make sure media equipment is working.
- Locate restrooms, coat racks and exits. Place signs in appropriate places to help people find the room/event.
- Distribute nametags, workbooks and pencils or pens.
- Greet attendees and ask them to register/sign in.
- Start and end on time.
- Collect evaluation after the workshop.

## Evaluate - within 48 hours

- Call and thank participants who requested follow-up on their evaluations. Provide answers to any questions and recommend setting up Connect. (Refer to follow-up phone script located on FieldNet for each workshop.)
- If applicable, meet with congregational/Lutheran institution leaders to review participant results and discuss how well their goals were met as outlined during the recommendation meeting.
- Look for ways to continue to build your visibility and awareness within congregation. Consider scheduling additional workshops as appropriate in meeting congregational priorities.
- Mail Thank You cards via Fleximail to attendees.
- Contact 'No shows' via phone. Offer a one-on-one discussion of topic.
- Contact those who never RSVP'd and tell them what they missed and ask if they have any questions.

**Date Completed:** \_\_\_\_/\_\_\_\_/\_\_\_\_

## Recognize

- Send a thank-you card to contact person(s), congregation staff, etc., as appropriate.
- If applicable, include follow-up note in the congregation's/Lutheran institution's newsletter that highlights overall attendance and positive feedback, and includes additional workshops that will be scheduled.



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