



## Printable Organizer's To-Do List

### **11 – 12 weeks before training**

- ❑ Select a lead contact person from your organization to handle communications with CAC, attendees and others
- ❑ Determine class level to be hosted
- ❑ Determine and secure co-hosts and determine role each will play in planning, marketing, and implementing the training
- ❑ Set training date and location
- ❑ Negotiate and confirm facility space costs
- ❑ Determine and contract with instructor(s)
- ❑ Contact CAC to confirm date, location, and instructors by filling out [CAC Training Authorization form](#) so information can be posted on CAC web site
- ❑ If seeking DOE Funding fill out and send DOE Training Request form and return to DOE
- ❑ Develop mailing list
- ❑ Establish process for collection of registration fees; purchase orders (if used)

### **9-10 weeks before training**

- ❑ Develop and print marketing package; distribute it through co-host networks
- ❑ Determine and execute marketing follow-up strategy (in-person contacts, etc.)
- ❑ Fill out [electronic spreadsheet](#) to record registrants' contact information, including name, company, address, phone and fax number, and email address
- ❑ Ongoing with registration, send (mail or email), confirmation of registration letter, agenda, and pre-workshop assignment to attendees prior to the training. (*Registrants should complete pre-workshop assignment and bring it to class.*)

### **6 – 8 weeks before training**

- ❑ Select on-site manager and review on-site procedures and specifications

### **4 weeks before training**

- ❑ Review on-site procedures and specifications with on-site manager
- ❑ Begin making list of registered attendees
- ❑ Order training materials online by requesting password from CAC. Materials include *Fundamentals or Advanced* training manuals and *Best Practices of Compressed Air Systems* manuals for the Fundamentals class (process may differ when co-hosting with DOE)

## **2 weeks before training**

- ❑ Request CEU cards from Registration Services at Iowa State University-at 515-294-6222 or [registrations@iastate.edu](mailto:registrations@iastate.edu).
- ❑ Confirm registrants have confirmations and pre-workshop materials

## **1 week**

- ❑ Confirm arrangements with hotel or facility; give them final head count for food
- ❑ Establish process for registering walk-ins
- ❑ Arrange for training manuals, Best Practices manuals, and supply box to be at the training facility
- ❑ Prepare name tags
- ❑ Print attendance certificate using the [CAC Certificate template](#)

## **During the Training**

- ❑ Introduce host, co-hosts and instructors
- ❑ Ensure everyone has completed the sign-in sheet
- ❑ Maintain integrity and product neutrality of the training session
- ❑ Distribute evaluation forms and CEU request cards at end of training

## **After the Training**

- ❑ Send a copy of the attendee check-in list and completed evaluation forms to the CAC
- ❑ Send Excel file listing registrants (including walk-ins) to CAC (include registrant's name, company name, address, email/phone, and title if possible) and DOE coordinator
- ❑ If applicable, send requests and money for CEU certificates to Iowa State University **if** the students are not sending their requests individually

## **Contact information**

CAC Information: [info@compressedairchallenge.org](mailto:info@compressedairchallenge.org)

DOE Coordinator: [DOEITPTraining@ppc.com](mailto:DOEITPTraining@ppc.com)