Facilitator Checklist

As Soon As Possible

Task	Instructions	Notes	
Worksheet A | Activity Set-Up Form and Application	Select Take course or Resume and follow prompts		
Worksheet B | Accreditation Critera	Select Take course or Resume and follow prompts		
Worksheet C | Standards for Integrity and Independence	Select Take course or Resume and follow prompts		☐
Faculty list template	Download this template, add the information, and upload to file link.		☐
Speaker headshots and bios and planner bios	Upload to file link.		☐

Before Publication of Activity

Task	Instructions	Notes	
Activity or conference agenda	Upload to file link.		☐
Logos	Upload to file link.		☐
Email communication templates to participants	Download this template, make any desired changes, and re-upload to the file link.		☐

30 Days Before Activity

Task	Instructions	Notes	
Evaluation template	Download this template, add your questions, and upload to the file link.		☐

30 Days After Activity

Task	Instructions	Notes	
Monetary Tracking Sheet	Download this template, add your questions, and upload to the file link.		☐