

### Master Planning Checklist

**Purpose:** This checklist includes all the high-level job steps that must be performed in planning the OJT workshop. The Coordinator typically performs these job steps.

Prior to the Workshop	NOTES
1. Select workshop site	
2. Coordinate any information gathering.	
3. Draft a workshop agenda and select read ahead materials.	
4. Select and arrange for workshop facilitator and recorder	
5. Obtain job-related materials.	
6. Finalize the workshop agenda, read ahead materials	
7. Arrange for workshop room facilities and computer equipment	
8. Obtain computer software templates and spreadsheets.	
9. Obtain supplies for workshop (Post notes, Marker pens, Pencils, Tape, Push pens, Post a note easel paper...)	

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2 Weeks Prior to Workshop	Notes
10. Follow up on logistics. (workshop supplies, facilities, etc)	
11. Send any read ahead material to workshop participants	
12. Provide team briefing and if necessary facilitator and recorder training	

<b>1 Week Prior to Workshop</b>	<b>Notes</b>
14. Confirm with SME manager/supervisors concerning participant's commitment	
<b>Day Before the Workshop</b>	<b>Notes</b>
15. Make the final room check	
16. Have all supplies and equipment available	
17. Bring several copies of all documents	
18. Discuss introductions with welcoming officials	
<b>Day of Workshop</b>	<b>Notes</b>
19. Make introductions	
20. See to the needs of the participants (phones, email during breaks)	
21. Monitor satisfaction of the participants	
22. Set ground rules (if necessary modify)	
23. Conduct the workshop	

***Remember to leave room for the participants to place their "Sticky" notes on the walls during the initial exercise***

**Checklist**

\_\_\_\_\_ Unbroken wall surface of at least 30 feet on two walls and should be big enough to comfortably accommodate the team and observers.

\_\_\_\_\_ Minimize obstructions such as doors, windows, etc. on the job analysis workshop walls.

\_\_\_\_\_ Remember to leave room for the participants to arrange their “Job steps” on the wall during the silent affinity exercise (and leave a space to “park” job steps so that they can be considered later.

\_\_\_\_\_ Choose supplies based on the kind of walls in the room (non-marking putty, tape, sticky pads, push pins, staples, etc.).

\_\_\_\_\_ People should be able to see each other and anything that is attached to the walls.