

Workshop Coordinator Checklist

Project Name:	TRACS #:	Work Unit #:	Contractor Name:
DE Name:	RE Name:	Coordinator Name:	Contractor Contact:

Step / When	Who	Tasks	Why / Details	Contact Information / Comments
1. Bids have been opened	ADOT Partnering Project Manager	Contact the Community Relations Project Manager.	Learn about the complexity and history of the project.	
2. Project has been awarded schedule conference call	ADOT Partnering Project Manager	Contact the Workshop Kickoff Team (ADOT RE and DE; Contactor Owner and PM; ADOT Facilitator) to schedule the Workshop Kickoff Team meeting or conference call. Send the Workshop Kickoff Checklist, Partnering Workshop Attendees Checklist and the link to "Partnering 101" to the team.	This team will plan all logistics for the workshop.	
3. Conference call	Workshop Kickoff Team	Determine all logistics for the Partnering Workshop by using the Workshop Kickoff Checklist, the Partnering Workshop Attendees Checklist and Chapter 4 of "Partnering 101".	The contract must be signed by the contractor prior to the workshop date.	
4. Following the Workshop Kickoff Meeting conference call	Partnering Project Manager	If a consultant facilitator is requested, the Partnering Project Manager will make all of the arrangements including the task order and payment.		
5. Following the Workshop Kickoff Meeting conference call	RE*, Contractor PM and Facilitator	Finalize the date and details regarding the workshop time, location and food based on the decisions of the Workshop Kickoff Team.	Sufficient time and facility space must be allowed to accomplish the goals of the workshop.	
6. Following the Workshop Kickoff Meeting conference call	RE*	Contact a Meeting and Conference Planner and create the PO if the workshop will be held in a conference room that must be paid for or if a food vendor that is not in the ADOT Procurement system will be used.	State procurement rules require the use of a Meeting and Conference Planner if paying for a meeting room or food from a vendor that is not in the ADOT Procurement system. The PO must be completed before the planner can contract with the conference room location on ADOT's behalf.	

*Any responsibility listed may be assigned to another ADOT staff member if the RE chooses; however, the RE will be responsible for ensuring completion.



Step / When	Who	Tasks	Why / Details	Contact Information / Comments
<p>7. When facility is secured</p>	<p>RE* and/or Facilitator</p>	<p>Send the invitation by email and Outlook meeting invitation to the people identified by the Workshop Kickoff team. Be sure to give a deadline to RSVP. Update the Partnering Workshop Invitation Letter Template to suit this project. Copy and paste it into the body of the email and the Outlook meeting invitation. The Partnering Workshop Invitation Letter Template must be used.</p>	<p>When the letter is sent as an attachment to an email, many people do not open it. It contains important information and a training link that people new to Partnering can complete prior to attending. When sending out the invitation, be sure to copy Partnering-Info@azdot.gov</p>	
<p>8. 1 day after RSVP date</p>	<p>RE*</p>	<p>Report number of confirmed attendees to the Facilitator. If needed, call or email workshop invitees to confirm attendance.</p>	<p>An accurate count is important to ensure the meeting room will accommodate everyone, for ordering food and for the facilitator to prepare for the workshop.</p>	
<p>9. Within seven calendar days of the workshop</p>	<p>Facilitator</p>	<p>Send Partnering Workshop Report to all members of the project team.</p>		
<p>10. As soon as possible following the workshop</p>	<p>RE*</p>	<p>If food was served or a Meeting and Conference Planner was used, process and send invoices to Accounts Payable for these services.</p>		
<p>11. As soon as possible following the workshop</p>	<p>Partnering Project Manager</p>	<p>If a consultant facilitator was used, send a copy of their final invoice to the construction work unit for their records.</p>		

*Any responsibility listed may be assigned to another ADOT staff member if the RE chooses; however, the RE will be responsible for ensuring completion.