



Living Well with Chronic Conditions (CDSMP)

Leader Planning and Implementation Checklist

This worksheet is a guide to help schedule, organize and implement your workshops.

3 Months in Advance

Leader name, address, phone and email	
1.	
2.	

Following are tasks to be completed three months in advance of the workshop. *It is recommended that leaders hold their first workshop within 3 months of training.* Review the tasks and identify which leader, or both, will be responsible for each.

	Leader #1	Leader #2
Workshop dates		
Workshop times		
Reserve workshop site		
a) Site address (including room #)		
b) Site contact		
c) Is the site accessible by public transportation?		
d) Is there public parking near the site?		
e) Is the site (including the building, room and restrooms) accessible to people with mobility challenges?		
f) Is there storage space available at the site between sessions?		
g) Enter class information on YourJuniper.org. <i>(This MUST be done no later than 30 days prior to class start date.)</i>		

2 Months in Advance

Conduct outreach and marketing for the workshop (on-going over the two months). This is the most critical set of tasks, listed in order of effectiveness.

	Leader #1	Leader #2
Personal invitations (see Leader Tools 5.)		
Presentations to health care partners (see Leader Tools 7.) Who will conduct them? Where will they be conducted?		
Brochures and flyers (see Leader Tools 4a. & 4b.)		

Who will enter local information? Who will print them? How will they be distributed? Where will they be distributed?		
Community Calendar (see Leader Tools 6.)		
Newspaper article (see Leader Tools 6.)		
Newsletter article (see Leader Tools 6.)		
Radio announcement (see Leader Tools 6.)		
Newsletter article (see Leader Tools 6.)		
Other Media (see Leader Tools 6.)		

2 Weeks in Advance

Charts – review, update, and create as necessary
Meet with co-leader - review material, coordinate, and assign who will teach each activity.
<p>Materials needed for workshop</p> <ul style="list-style-type: none"> <input type="checkbox"/> Living a Healthy Life with Chronic Conditions workbook – 1 for each participant <input type="checkbox"/> Participant Completer Certificate (see Leader Tools 3d.) – 1 for each participant <input type="checkbox"/> Copy of Workshop Overview and Homework by Session handout – 1 for each participant <input type="checkbox"/> Leader Manual <input type="checkbox"/> Relaxation for Mind and Body CD and CD player <input type="checkbox"/> 2 Easels <input type="checkbox"/> Completed flip charts <input type="checkbox"/> Blank flip chart <input type="checkbox"/> Markers <input type="checkbox"/> White board & markers (optional) <input type="checkbox"/> Box of tissues <input type="checkbox"/> Water for all <input type="checkbox"/> Snacks (optional)
<p>When workshop is completed</p> <ul style="list-style-type: none"> • Enter the following data on YourJuniper.org <ul style="list-style-type: none"> <input type="checkbox"/> Pre- and Post-Surveys <input type="checkbox"/> Attendance • Maintain these documents in your agency files. <ul style="list-style-type: none"> <input type="checkbox"/> Photo Release (if needed) <input type="checkbox"/> Juniper Registration Form <input type="checkbox"/> Class Evaluation (along with any supporting documentation of actions that need to be taken) <input type="checkbox"/> Share Your Story (if applicable)

**For Questions or Concerns contact Chronic Disease Self- Management Master trainers:
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