

Program Planning Checklist

This checklist can be used as a tool for new employees and gives an overview of procedures in the program planning process. Links are provided for tools and forms listed.

Dream

- ☐ Try to brainstorm early with your Engagement team to plan programs. Some locations plan for a semester all at once. Refer to [Program Planning Phases](#).
 - ☐ Can use the [Collaboration Resources Toolkit](#) for ideas for team brainstorming
- ☐ Use the [Dream Worksheet](#) to begin brainstorming process.
- ☐ Follow OPBE steps to plan individual programs or program series:
 - ☐ What is the community need? What is happening in our community?
 - ☐ Identify the program outcome(s) (benefits to people within a program. MLS outcomes: civic engagement, health and wellness, literacy, cultural enrichment, and educational attainment)
 - ☐ Refer to the [How to Write an Outcome Statement](#)
- ☐ Discuss with supervisors and/or team. Engagement Managers will communicate w/Library Managers.
- ☐ Estimate the budget
- ☐ Determine who will present program-staff or outside presenter
 - ☐ If presenter is paid, contact presenter with fee, availability, and dates
 - ☐ If presenter is a volunteer, refer to volunteer supervisor at branch. Volunteer presenters must fill out applications and have background checks run through DVS.

Build

+/- 3-4 Months Before Program:

- ☐ Use the [Build Your Program Worksheet](#) to draft program plan
- ☐ Discuss with supervisor the [Build Your Program worksheet](#)
- ☐ Reserve meeting room(s) with room set-up and reserve any AV needs.
- ☐ If using a paid presenter, send required *forms* and deadlines for form return.
 - ☐ [ACH Direct Deposit](#)
 - ☐ [Special Programming form](#)
 - ☐ [W-9](#)
- ☐ Request *Marketing materials* if required or create ones locally
- ☐ Make sure event is published in the Metro Calendar

+/- 2-3 month Before Program:

- ☐ Make exact list of supplies and send supply orders to engagement manager, and/or request Walmart or Hobby Lobby card from engagement manager. Submit RTO.
- ☐ Notify your manager when you need to purchase perishable supplies.
- ☐ Begin pulling needed supplies from supply cabinets.

+/- 3-4 Weeks Before Program:

- ☐ Share posters in library and out in community
- ☐ Update other staff on details of program in case they need to present in your absence.
 - ☐ If the presenter is an outside presenter, make sure to share contact information of the presenter with staff
- ☐ If having an outside presenter, e-mail or call presenter to check-in.
- ☐ Create a program display and/or passive program connecting the event to library resources and services
- ☐ For paid presenters, make sure all paperwork is turned into an engagement manager
- ☐ For volunteer presenters and volunteer helpers, make sure volunteer coordinator has them placed

Launch

Day of Program:

- ☐ Make sure room is set-up for the program
- ☐ Create in-program book display
- ☐ Introduce the program, share information about other events
- ☐ Help participants with seating and any activities

After Program:

- ☐ Clean the area
- ☐ For paid presenters, let the engagement manager know they can convert the RTO for payment.
- ☐ For volunteer presenters and helpers, contact your local volunteer supervisor to enter their volunteer hours
- ☐ Record attendance

Reflect

- ☐ Use the [Reflect Worksheet](#) to reflect on program.
 - ☐ Did you achieve your outcome statement?
 - ☐ What would you change?