



Climate Education & Stewardship Project Map: Checklist for Delegation & Timeline of Tasks

You're ready to start the project planning process! What do you hope to accomplish? Who's on your planning team? What are all the steps to support an effective launch of this event? What does your timeline look like? Use this Project Map to support your team's project organization, delegate roles, and check tasks off the list as you go. Happy CES planning!

6-12 Months Out

The first 6-12 months of planning prior to the event launch are crucial! This is when you shape:

- Project theme, goals and outcomes
- Date (s) and timing of event
- Project logistics such as location, meal planning, partners
- Planning committee team

| LOGISTICS | Lead Person | Months | Due | Completed | Notes |
|---|-------------|--------|-----|-----------|-------|
| Identify Goals of Project: Educational Event and/or Stewardship Project | | 6-12 | | | |
| Identify and list themes: Hike with a purpose, lecture/film/presentation, stewardship | | 6-12 | | | |
| Explore date ranges that could work | | 6-12 | | | |
| Contact Land Managers/others about volunteer options | | 6 | | | |
| Brainstorm audience, experts, and potential partners | | 6 | | | |
| Count maximum number of campsites/ cars/people | | 6 | | | |
| Research contacts and make needed reservations | | 6-12 | | | |
| Solidify date and confirm with all involved. | | 6-12 | | | |
| Send fees/obtain permits and receive confirmation | | 6 | | | |
| Draft budget, anticipated costs; possible opportunity for registration fees? | | 6 | | | |

| COMMUNICATIONS | Lead Person | Months | Due | Completed | Notes |
|--|--------------------|---------------|------------|------------------|--------------|
| Track RSVPs and determine communication timeline with participants | | 6 | | | |
| Post event to Broads website calendar | | 6 | | | |

| FOOD | Lead Person | Months | Due | Completed | Notes |
|--|--------------------|---------------|------------|------------------|--------------|
| Review options for caterers/camp cook/lunch provided | | 6 | | | |

| SPEAKERS and SPECIAL GUESTS | Lead Person | Months | Due | Completed | Notes |
|--|--------------------|---------------|------------|------------------|--------------|
| Decide when speakers or special guests would be appropriate | | 6 | | | |
| Review potential speakers or special guests | | 6 | | | |
| Determine how many speakers you can/want to host and narrow down options | | 6 | | | |

3-6 Months Out

- Use communications strategies to go public with event
- Recruit attendees or volunteers and manage an RSVP list
- Solidify speakers, special guests, and hike leads:
- Solidify roles for event facilitation i.e. activity facilitators and coordinate needed training

| LOGISTICS | Lead Person | Months | Due | Completed | Notes |
|--|--------------------|---------------|------------|------------------|--------------|
| Contact Land Managers/others about volunteer options | | 3-6 | | | |
| Narrow down locations and choose spot | | 3-6 | | | |
| Visit venue, campground, campsite options (if needed) | | 3-6 | | | |
| Visit lunch, break, or presentation location options | | 3 | | | |
| Plan for shelter if inclement weather | | 4 | | | |
| Ensure toilets/water/parking | | 4 | | | |
| Identify level of activity and audience: Is this the appropriate target group? | | 3-6 | | | |
| Identify trip leader, planning committee and main contact | | 3-6 | | | |

| STEWARDSHIP COMMUNICATIONS | Lead Person | Months | Due | Completed | Notes |
|--|--------------------|---------------|------------|------------------|--------------|
| Invite CES staff to review event content and invitation | | 3-6 | | | |
| Identify timeline and means for RSVP | | 3-6 | | | |
| Email final version of invitation | | 3-6 | | | |
| Publish on Facebook for general public | | 5 | | | |
| Ensure you have waivers signed and health/food allergy info collected | | 5 | | | |
| Contact media with information as appropriate | | 5 | | | |
| Send welcome email to all registrants. Let them know when you'll contact again with trip logistics, ensure they've signed trip waivers, and you have their dietary and health info | | 3 | | | |

| FOOD | Lead Person | Month | Due | Completed | Notes |
|--|--------------------|--------------|------------|------------------|--------------|
| Select and contract with caterer/camp cook | | 4 | | | |
| Decide menu | | 4 | | | |

| SPEAKERS and SPECIAL GUESTS | Lead Person | Month | Due | Completed | Notes |
|---|--------------------|--------------|------------|------------------|--------------|
| Get contact info for speakers | | 5 | | | |
| Draft invite for speakers and email/call them with invitation | | 5 | | | |
| Arrange accommodations for special guests if necessary | | 3 | | | |

| HIKES | Lead Person | Month | Due | Completed | Notes |
|------------------------------------|--------------------|--------------|------------|------------------|--------------|
| Consider hike options and themes | | 3 | | | |
| ID leaders for hikes | | 3 | | | |
| Apply for hike permit if necessary | | | | | |
| Invite hike leader to meals | | 3 | | | |

0-3 Months Out

- Use last push to publicize your event and recruit last group of registrants
- Communicate with your RSVP list and prep them for the event
- Communicate with your speakers, special guests, and hike leads and confirm their spot on the agenda
- Solidify risk management plan, food delivery, method of event delivery, and who is the lead on what
- Gather all materials, tools, Broads bling, and resources needed for event
- Visit your site, do a walk through and confirm all last minute details are taken care of with main contacts, venue, vendors

| LOGISTICS | Lead Person | Month | Week | Due | Completed | Notes |
|--|-------------|-------|------|-----|-----------|-------|
| Draft list of tools and materials needed | | 1 | | | | |

| COMMUNICATIONS | Lead Person | Month | Week | Due | Completed | Notes |
|---|-------------|-------|------|-----|-----------|-------|
| Clarify audience and how many people expected | | 1-1 | | | | |
| Draft invite with info on cost, location, times, contacts, and prep list | | 1 | | | | |
| Send reminder email out before end of RSVP date | | | 2-4 | | | |
| Send email to registrants welcoming them and thanking them for joining. Let them know when you'll contact again with trip details, ensure they've signed trip waivers, and you have collected their dietary and health info | | 1 | | | | |

| FOOD | Lead Person | Month | Week | Due | Complete | Notes |
|---|-------------|-------|------|-----|----------|-------|
| Pay down payment for food | | 1 | | | | |
| Provide final head count to cook by deadline | | | 2 | | | |
| Provide caterer/cook with food allergies or special needs | | | 2 | | | |

| HIKES | Lead Person | Month | Week | Due | Complete | Notes |
|--|--------------------|--------------|-------------|------------|-----------------|--------------|
| Confirm leader for hike | | 2 | 0 | | | |
| Get maps for hike | | 2 | 0 | | | |
| Work with hike leaders on safety protocols and risk management | | | 2-4 | | | |
| Prepare materials, tools, maps, or other needs for successful hike | | | 3 | | | |
| Send RSVP reminder about event | | | 2 | | | |

| PARTICIPANT OUTREACH | Lead Person | Month | Week | Due | Complete | Notes |
|---|--------------------|--------------|-------------|------------|-----------------|--------------|
| Write pre-trip letter email with: Description, Logistics (Location, Date/ times, Agenda), Packing list (Clothing/ weather to expect, gear to bring) | | 1 | 0 | | | |

Completion of Event:

Follow up- You did it! How did it go? Don't forget to evaluate and celebrate along the way and especially now that you've completed your project! Now last steps:

| EVENT/ FOLLOW UP | Lead Person | Weeks | Due | Completed | Notes |
|---|--------------------|--------------|------------|------------------|--------------|
| Communicate actions needed by participants—share experiences, calls, etc. | | 1 | | | |
| Hand out or email evaluation to participants | | 0-1 | | | |
| Thank you notes to speakers, hike leaders, etc. | | 1-2 | | | |
| Staff, Broadband Leaders & Incident Debrief | | 1-2 | | | |
| Plan next steps—what happens now? | | 2 | | | |