



# Course Coordinator Interactive Checklist

In-person, virtual, and hybrid class delivery

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## How to use this checklist

Complete the fillable fields and check each item as you coordinate the class. Use the format-specific pages for in-person or virtual responsibilities, then keep the completed checklist with the class records.

[Open the current Education Chairs and Course Coordinators resource page](#)

## Class Information and Workflow

Complete this page once the CSMA form has been completed or an instructor TBD virtual class has been claimed from the IRWA HQ schedule on the website. Update it as registration and delivery details change.

### Class information

|                      |                      |                          |
|----------------------|----------------------|--------------------------|
| <b>COURSE NUMBER</b> | <b>COURSE TITLE</b>  | <b>CHAPTER OR REGION</b> |
| <input type="text"/> | <input type="text"/> | <input type="text"/>     |

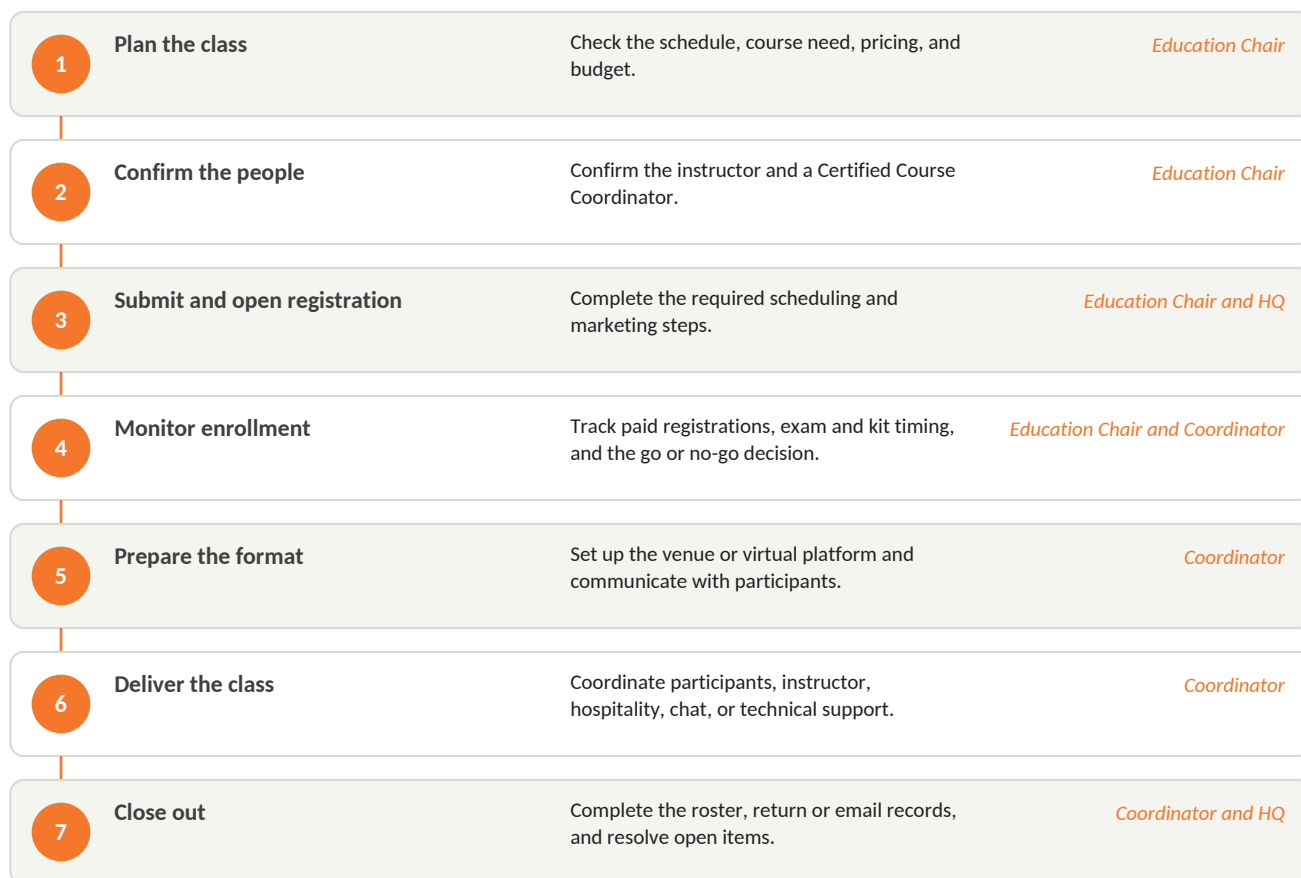
|                                                                                                     |                      |                      |
|-----------------------------------------------------------------------------------------------------|----------------------|----------------------|
| <b>DELIVERY FORMAT - SELECT ONE</b>                                                                 | <b>CLASS DATE(S)</b> | <b>COORDINATOR</b>   |
| <input type="checkbox"/> In-person <input type="checkbox"/> Virtual <input type="checkbox"/> Hybrid | <input type="text"/> | <input type="text"/> |

|                      |                          |                       |                      |
|----------------------|--------------------------|-----------------------|----------------------|
| <b>INSTRUCTOR</b>    | <b>VENUE OR PLATFORM</b> | <b>EXPECTED COUNT</b> | <b>START DATE</b>    |
| <input type="text"/> | <input type="text"/>     | <input type="text"/>  | <input type="text"/> |

### Scheduling and delivery workflow

The Education Chair leads scheduling and works with the PDC Chair to obtain the IRWA HQ report listing members who are declared credential candidates and the courses they still need to complete their coursework requirements.



Complete these general tasks before participant communications begin. Confirm which items belong to the Education Chair, the Coordinator, or IRWA Headquarters.

## Role boundary

The Education Chair schedules and budgets the class. The Course Coordinator manages the participant experience, class logistics, and required documentation.

## General preparation checklist

- ☐ Confirm the course number, title, dates, delivery format, time zone, and class schedule.
- ☐ Confirm the instructor contact information and review breaks, meals, pre-work, and special course requirements.
- ☐ Confirm the coordinator has access to the class roster and knows how to download the current roster.
- ☐ Confirm whether the course has state CE approval and whether participants must provide license numbers.
- ☐ Confirm the registration contact and the process for participant cancellations, refunds, or transfers.
- ☐ Confirm the go or no-go decision process with the Chapter Education Chair as the class date approaches.
- ☐ Confirm how IRWA Headquarters will be contacted for missing materials, roster questions, or technical issues.
- ☐ Record any local instructions for the venue, platform, parking, access, meals, or participant communication.
- ☐ Share any required pre-course work or participant instructions before the class.
- ☐ Review the format-specific checklist on the following pages before the class date.

## HANDOFF NOTES, LOCAL CONTACTS, OR OPEN QUESTIONS

The Course Coordinator orders exams and the Coordinator Kit. Participants order their own course materials during registration and receive printed materials directly at home or at the office.

## Role boundary

Do not order participant manuals for the class. Confirm the participant registration process is handling printed-material orders and direct shipment. The Coordinator orders only exams and the Coordinator Kit.

## Coordinator ordering checklist

- ☐ Review the current event roster and confirm the total number of paid registrants.
- ☐ Order exams and mandatory auxiliary materials based on the total number of students registered.
- ☐ Order the Course Coordinator Kit at least 10 business days before class.
- ☐ Confirm the kit includes scantrons, the Course Coordinator survey, and the return envelope.
- ☐ Verify the shipment against the blue packing slip when it arrives.
- ☐ Report missing items immediately to [education@irwaonline.org](mailto:education@irwaonline.org) or 310-538-0233 ext. 124.
- ☐ Remind participants that electronic PDF links are provided in confirmation emails and in Education History.
- ☐ Confirm student evaluations will be emailed directly to participants after the class; do not distribute paper student evaluations.
- ☐ Complete and return the Course Coordinator survey when required by the current instructions.

## Order and tracking details

### EXAMS ORDERED

### COORDINATOR KIT ORDERED

### TOTAL REGISTERED

### EXAM / SCANTRON COUNT

### KIT RECEIVED BY

### BLUE PACKING SLIP CHECKED

### Participant materials guide

Participants order printed materials during registration and receive them directly. Use this link for participant ordering help or exceptions; it is not a Coordinator ordering task.

[Open participant materials ordering link](#)

### MISSING ITEMS, SURVEY, OR ORDER NOTES

Use this page for classes held at a physical facility. Complete the virtual pages instead when the class is fully online.

## In-person timing

Plan to arrive one hour early. Confirm venue access, room setup, audio/visual needs, Coordinator Kit, hospitality, and participant instructions before the class.

### Instructor and participants

- ☐ Obtain the instructor's audio/visual, classroom setup, supply, and technology requirements.
- ☐ Confirm the instructor has the most recent course materials and review the schedule and breaks.
- ☐ Identify any pre-work or additional course requirements and share them with participants.
- ☐ Send facility access instructions, arrival information, and any required pre-course information.
- ☐ Ask participants about dietary restrictions if food or refreshments will be provided.
- ☐ Confirm whether participants need to bring fully charged computers if power may be limited.
- ☐ Confirm the class status with the Education Chair as the class date approaches.

### Venue and IRWA Headquarters

- ☐ Relay room layout, A/V, Wi-Fi, flipchart, markers, seating, signage, and other setup requirements to the venue.
- ☐ Confirm facility entry and exit instructions, restroom locations, emergency exits, and arrival and departure times.
- ☐ Obtain approval for anticipated food, beverage, and other expenses from the Chapter Education Chair.
- ☐ Order exams and the Course Coordinator Kit at least 10 business days before class.
- ☐ Download and review the current electronic course roster.
- ☐ Confirm that the exams and Coordinator Kit have arrived, including scantrons, the Course Coordinator survey, and return envelope.
- ☐ Contact [education@irwaonline.org](mailto:education@irwaonline.org) or 310-538-0233 ext. 124 about missing materials.

### IN-PERSON PREPARATION NOTES

# In-Person Class: Day of Class and Closeout

Complete the day-of and post-course tasks before leaving the facility and again after returning the required records to IRWA Headquarters.

## Arrival and class experience

- ☐ Arrive one hour early and meet with the instructor.
- ☐ Confirm the classroom setup, A/V, Wi-Fi, seating, signage, supplies, exams, and Coordinator Kit materials.
- ☐ Display membership and marketing information.
- ☐ Greet participants and ask them to sign the printed roster.
- ☐ Collect license numbers when the course has approved real estate, appraisal, easement right of way, or legal state CE credits.
- ☐ Make pre-course announcements and introduce the instructor.
- ☐ Set up and clean up hospitality, or announce available options if no hospitality is provided.
- ☐ Do not distribute or collect paper student evaluations; IRWA emails evaluations directly to participants.
- ☐ Manage invoices and retain documentation for the Chapter.

## Closeout and documentation

- ☐ Complete and sign the course roster and have the instructor sign it.
- ☐ Make a copy of the completed roster for the Chapter.
- ☐ Collect the sealed and initialed exam envelope from the instructor.
- ☐ Place the exams and roster in the prepaid USPS return envelope from the Coordinator Kit.
- ☐ Mail the required records to IRWA Headquarters within 24 hours when possible.
- ☐ Remove course supplies and dispose of garbage appropriately.
- ☐ Collect venue invoices or other documentation for Chapter use.

ROSTER AND EXAM RETURN DATE

USPS TRACKING NUMBER

EXPENSE OR INVOICE STATUS

CLOSEOUT NOTES OR FOLLOW-UP ITEMS

## Virtual Class: Before the Class

Use this page for a fully virtual class. If the class is hybrid, complete the virtual tasks and the applicable venue tasks from the in-person pages.

### Virtual timing

The coordinator and instructor should arrive at least 30 minutes early. Confirm participant access, system requirements, support roles, and roster procedures before class.

### Access and communication

- ☐ Confirm the coordinator's support role with the instructor, including chat monitoring and documentation distribution.
- ☐ Confirm the virtual platform link, class schedule, time zone, and instructor access.
- ☐ Send participants the Virtual Class Participant Guide and any required pre-work.
- ☐ Ask participants to complete a company IT and systems security check at least 24 hours before class.
- ☐ Confirm participants know how to access the platform and whom to contact if they cannot join.
- ☐ Confirm whether participants must provide license numbers for approved state CE credit.

### Testing and support links

- ☐ Ask participants to verify that their systems meet the virtual class requirements.
- ☐ Review the current technical best practices and webcam and microphone troubleshooting resources.
- ☐ Confirm a backup contact for technical issues during the class.
- ☐ Confirm the current roster is available and understand how the instructor will sign the PDF roster.
- ☐ Confirm the process for contacting IRWA Headquarters during business hours if access or technical issues occur.
- ☐ Record the date when the participant access reminder was sent.

ACCESS REMINDER SENT

PLATFORM OR MEETING LINK

### Quick technical links

[Run the virtual system test](#)

[Kaltura virtual classroom best practices](#)

[Webcam and microphone FAQs](#)

VIRTUAL PREPARATION NOTES

## Virtual Class: Day of Class and Closeout

Complete the day-of and post-course tasks for a fully virtual class. The exam is launched and closed by the instructor and electronically exported by IRWA Headquarters.

### During the class

- ☐ Arrive at least 30 minutes early with the instructor.
- ☐ Greet participants as they arrive and note attendance on the roster.
- ☐ Ask participants to provide license numbers when required for approved state CE credits.
- ☐ Make any necessary announcements and introduce the instructor.
- ☐ Monitor the chat, make note of questions or comments, and relay them to the instructor at the appropriate time.
- ☐ Provide technical assistance when possible and use the support resources or contact HQ when needed.
- ☐ Stay in communication with IRWA Headquarters during the class if an issue affects delivery.

### Closeout and documentation

- ☐ Complete and sign the course roster.
- ☐ Have the instructor sign and return the PDF roster to the coordinator.
- ☐ Email the completed roster to [IRWAeducation@irwaonline.org](mailto:IRWAeducation@irwaonline.org).
- ☐ Confirm that IRWA emails the student evaluation directly to each participant after the class.
- ☐ Confirm that the instructor launched and closed the exam when an exam applies.
- ☐ Record any access, chat, attendance, or technical issues that require follow-up.
- ☐ Notify the Education Chair or IRWA Headquarters of any unresolved issue.

ROSTER EMAILED TO HQ

HQ CONTACT OR TICKET

FOLLOW-UP STATUS

CLOSEOUT NOTES OR FOLLOW-UP ITEMS

## Coordinator Role Recap

A one-page visual reference for the three parts of the Coordinator role. Use the format-specific pages for the full checklist.  
Every class moves through the same three responsibilities. The details change by delivery format.

### 1 Communicate

Keep the instructor, participants, HQ, and the venue or platform informed.

### 2 Coordinate

Make the class experience work, from room setup and hospitality to access, chat, and technical support.

### 3 Document

Complete the roster, collect required records, and send the right materials to the right place.

### Format comparison

| Responsibility   | In-person                                              | Virtual                                                   |
|------------------|--------------------------------------------------------|-----------------------------------------------------------|
| Primary contacts | Instructor, participants, HQ, facility                 | Instructor, participants, HQ                              |
| Before class     | Room, A/V, food, materials, access                     | Platform, access tests, chat and tech support             |
| During class     | Roster, announcements, hospitality, instructor intro   | Roster, announcements, chat monitoring, technical support |
| Closeout         | Signed roster, exams, prepaid mailer, facility cleanup | Signed PDF roster emailed to HQ                           |

☐ I reviewed the format-specific section for this class.

### QUICK NOTES

This page summarizes the policy points included in the training. Confirm current IRWA policy before communicating final details to participants.

## Attendance and exams

For qualifying education, participants must be physically present for at least 90% of classroom hours and pass the final exam with a score of 75% or better when an exam applies. For recertification credits, participants must be physically present for at least 90% of classroom hours and do not need to take the final exam when one applies.

## Participant registration cancellations

Participants should send written notice to the Course Coordinator and [registrations@irwaonline.org](mailto:registrations@irwaonline.org) before the class starts to be eligible for a tuition refund.

| Notice received                  | Refund or option | Coordinator reminder                                            |
|----------------------------------|------------------|-----------------------------------------------------------------|
| 15 days or more before class     | 100% refund      | Document the written request.                                   |
| Less than 15 days before class   | 75% refund       | Document the written request.                                   |
| On or after the class start date | No refund        | A registration transfer may be available at no additional cost. |

## Class cancellation

Classes may be canceled for insufficient registration, instructor emergencies, or other issues. IRWA Headquarters and/or the Course Coordinator will contact registrants when possible at least 15 days before the class. Registrants should contact the Coordinator before making travel arrangements. Tuition may be reimbursed, but IRWA and its Chapters assume no other registrant liability resulting from cancellation.

- ☐ I reviewed the attendance and exam requirements for this class.
- ☐ I know where to direct participant cancellation or transfer questions.

Use these current resources while planning, scheduling, delivering, and closing out a class. Keep the participant material-ordering link separate from the Coordinator ordering checklist.

## Online resources

[Education Chairs & Course Coordinators](#)

[Current IRWA course schedule](#)

[Certified Coordinator search](#)

[Find an instructor](#)

[IRWA course pricing](#)

[State approvals](#)

[Chapter Course Sponsorship Agreement](#)

[Certified Coordinator training](#)

[Participant materials ordering link](#)

[Virtual system test](#)

[Kaltura classroom best practices](#)

[Webcam and microphone FAQs](#)

### Participant materials guide

Keep a participant-facing material-ordering link available. Participants order their own printed materials during registration and receive them directly at home or at the office. The old Coordinator ordering guide should not be a required Coordinator task.

## Common contacts

### Missing exams or Coordinator Kit items

education@irwaonline.org | 310-538-0233 ext. 124

### Virtual technical issues

310-538-0233 ext. 127 or 124

### Virtual completed roster

IRWAeducation@irwaonline.org

### Participant registration cancellations

registrations@irwaonline.org

### Local class contacts

EDUCATION CHAIR

CHAPTER TREASURER

VENUE CONTACT

BACKUP COORDINATOR

## FINAL NOTES

☐ I completed the applicable checklist and resolved or documented open items.