



Education Chair Interactive Checklist

Planning, scheduling, and course oversight

How to use this checklist

Use this checklist to plan, schedule, budget, market, and hand off a class. The Course Coordinator checklist covers delivery, participant experience, logistics, and closeout.

[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

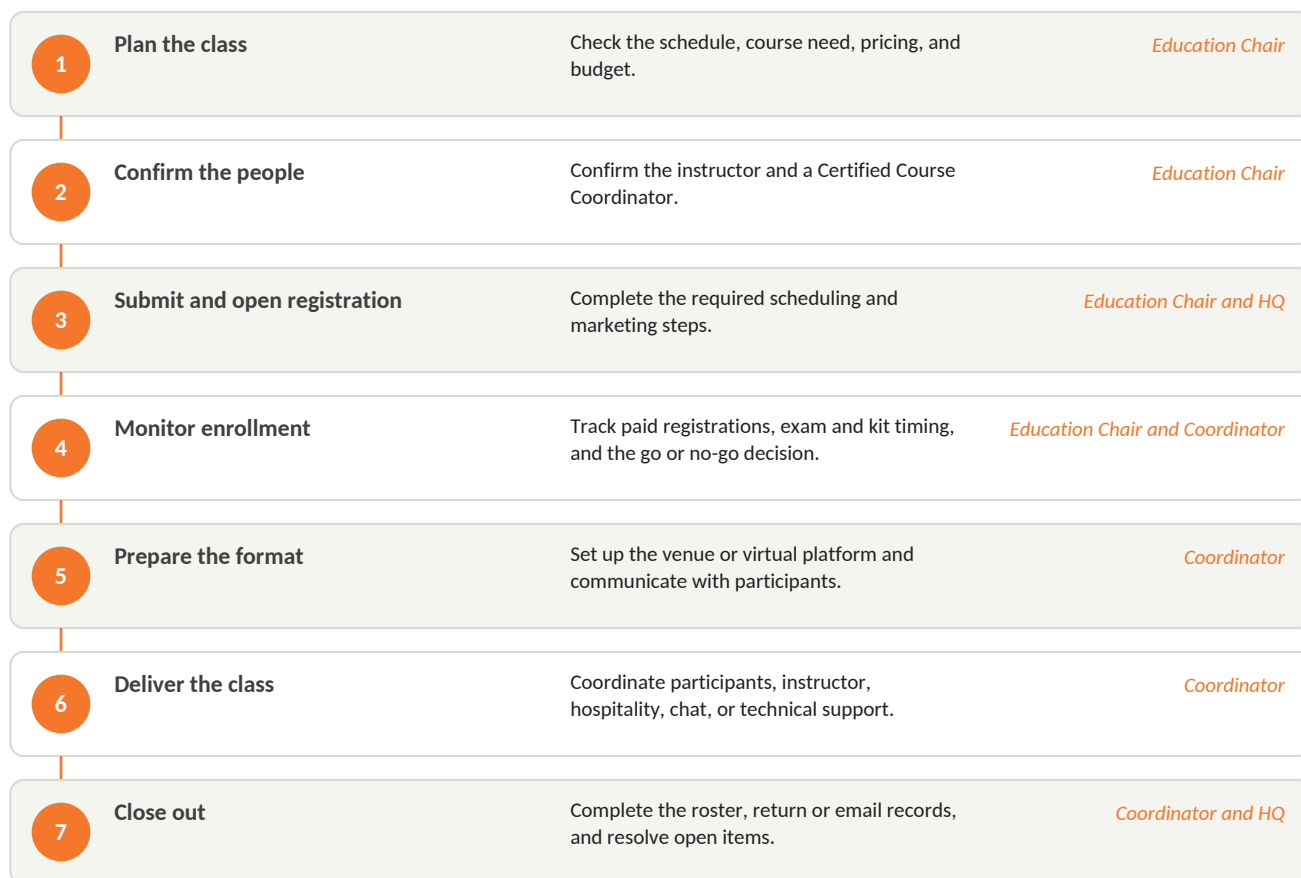
COURSE NUMBER	COURSE TITLE	CHAPTER OR REGION

DELIVERY FORMAT - SELECT ONE	CLASS DATE(S)	COORDINATOR
☐ In-person ☐ Virtual ☐ Hybrid		

INSTRUCTOR	VENUE OR PLATFORM	EXPECTED COUNT	START DATE

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.



Use this page to move a course from an identified need to an approved, visible, and financially workable class.

Planning reminder

Complete the Chapter Course Sponsorship and Marketing Agreement (CSMA) no less than 120 days before the scheduled course date. Confirm state approval before advertising continuing education credit.

Plan and schedule

- ☐ Obtain the current IRWA HQ candidate report with the PDC Chair to identify course needs.
- ☐ Check the current IRWA course schedule for date or audience conflicts.
- ☐ Confirm course pricing, break-even enrollment, budget, and approval path.
- ☐ Confirm the delivery format, date, expected enrollment, and time zone.
- ☐ Select a certified instructor and a Certified Course Coordinator.
- ☐ Submit the CSMA at least 120 days before the scheduled course date.
- ☐ Confirm the go or no-go date and the class cancellation process.

Marketing and website

- ☐ Create a marketing plan before submitting the CSMA.
- ☐ Confirm the IRWA website posting is accurate after the class is submitted.
- ☐ Share the announcement and registration link with members identified through the candidate report.
- ☐ Proof any brochure, newsletter, or local announcement before release.
- ☐ Notify agencies, employers, past attendees, and the local PDC when appropriate.
- ☐ Confirm the Coordinator has the registration, roster, and resource links.
- ☐ Update or correct the posting if the date, format, instructor, or venue changes.

CSMA SUBMITTED

MARKETING PLAN / POSTING NOTES

GO / NO-GO DECISION DATE

STATE CE APPROVAL STATUS

EDUCATION CHAIR PLANNING NOTES

Education Chair: Format Planning

Confirm the instructor, delivery environment, and support plan for the selected format before the Course Coordinator begins delivery preparation.

Format planning standard

The Education Chair confirms the format-specific environment, budget, contacts, and support expectations. The Coordinator should receive this information before participant communications begin.

Instructor, budget, and agreement

- ☐ Contact a certified instructor and confirm availability for the selected dates.
- ☐ Agree on the daily rate, travel, ground transportation, and expense cap.
- ☐ Confirm the go or no-go decision before the instructor makes travel plans.
- ☐ Confirm instructor technology, classroom, supply, and format requirements.
- ☐ Issue the instructor hiring letter and provide a copy to the Coordinator.
- ☐ Confirm the instructor has current course materials at least two weeks before class.

Format-specific planning

In-person

- ☐ Contract the facility and confirm room setup, A/V, Wi-Fi, access, and parking.
- ☐ Confirm hospitality, food and beverage, local travel details, and expense approvals.
- ☐ Identify the setup, cleanup, and facility contact for day-of issues.

Virtual

- ☐ Confirm the platform, class link, time zone, and instructor and Coordinator access.
- ☐ Confirm the technical test, chat or participant support, and escalation contacts.
- ☐ Confirm virtual communication, pre-work, and the contingency plan.

Hybrid

- ☐ Confirm facility and platform integration, including cameras, microphones, speakers, and stable internet.
- ☐ Assign on-site and remote support roles and define participant access and communication.
- ☐ Schedule a full technology rehearsal and confirm the backup plan.

INSTRUCTOR

PRIMARY VENUE / PLATFORM

HIRING LETTER / AGREEMENT STATUS

FORMAT-SPECIFIC SUPPORT LEAD

INSTRUCTOR, FORMAT, AND BUDGET NOTES

Education Chair: Format-Specific Handoff

Send the Coordinator the confirmed format-specific logistics, contacts, and support expectations before participant communications begin.

Handoff standard

The Education Chair owns the schedule, budget, approvals, and vendor agreements. The Coordinator should receive format-specific contacts and day-of expectations before the class opens.

Common handoff steps

- ☐ Finalize the course number, title, date, format, time zone, and approved schedule.
- ☐ Confirm the instructor, Certified Course Coordinator, and backup contacts.
- ☐ Confirm pricing, break-even enrollment, budget, and required expense approvals.
- ☐ Complete the CSMA, state approval steps, and website or marketing requirements.
- ☐ Confirm the registration opening date and the go or no-go decision date.

Send and confirm

- ☐ Send the Coordinator the schedule, instructor information, format plan, and local contacts.
- ☐ Confirm participants receive course-material ordering guidance through registration.
- ☐ Confirm the Coordinator knows to order only exams and the Coordinator Kit.
- ☐ Share HQ contacts for missing materials, roster questions, and virtual technical issues.
- ☐ Share cancellation, refund, transfer, and participant communication procedures.

Format-specific handoff checks

In-person

- ☐ Share facility access, room setup, A/V, Wi-Fi, parking, and the local contact.
- ☐ Share hospitality, setup and cleanup responsibilities, and approved expenses.

Virtual

- ☐ Share the platform link, time zone, access test, and technical support contacts.
- ☐ Confirm chat, participant support, escalation roles, and the backup plan.

Hybrid

- ☐ Share facility and platform details, including A/V, internet, and participant access.
- ☐ Confirm on-site and remote support roles, rehearsal timing, and the contingency plan.

HANDOFF DATE

REGISTRATION OPEN DATE

GO / NO-GO STATUS

HQ CONTACT

EDUCATION CHAIR HANDOFF NOTES

Keep these planning links and local contacts available while scheduling and supporting a class. Use the Coordinator checklist for delivery tasks.

Planning and support links

[Education Chairs & Course Coordinators](#)

[Current IRWA course schedule](#)

[Find an instructor](#)

[Certified Coordinator search](#)

[IRWA course pricing](#)

[State approvals](#)

[Chapter Course Sponsorship Agreement](#)

[Certified Coordinator training](#)

[Virtual system test](#)

[Kaltura classroom best practices](#)

[Webcam and microphone FAQs](#)

[Participant materials ordering link](#)

Role separation

Participants order their own printed materials through registration. The Course Coordinator orders exams and the Coordinator Kit. The Education Chair confirms that this process is communicated and supported.

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 planning contacts

EDUCATION CHAIR

INSTRUCTOR

COURSE COORDINATOR

VENUE / PLATFORM CONTACT

FINAL NOTES

☐ I completed the Education Chair checklist and documented open items.