

## Checklist for Planning and Preparation Phase



Description	Responsibility	Status (Not Started - In Progress - Complete)	Notes
<b>Objective 1: Build a Workshop Planning Team (4 Months Before Workshop)</b>			
<b>Planning and Development of Workshop</b>			
Identify and convene members of the workshop planning team.	<i>Workshop Planning Team</i>		
Assign team members to the advisory, planning, and research roles (individuals may fulfil more than one role).			
Define tasks and responsibilities for each team member.			
<b>Carrying out formative research</b>			
Determine whether the research functions will be carried out by a member of the planning team or an independent consultant.	<i>Planning Team Members</i>		
<i>If applicable:</i> Develop a Terms of Reference (ToR) that outlines the competences and responsibilities for the consultant responsible for carrying out the research functions.			
<i>If applicable:</i> Recruit and onboard the consultant who will be responsible for carrying out the research functions.			
<b>Objective 2: Define Workshop Goals and Participants (3 Months Before Workshop)</b>			
<b>Goals for the Workshop</b>			
Define the goals and objectives of the workshop, informed by background research on the home visiting program and its workforce.	<i>Planning and Advisory Team Members</i>		
Receive guidance from Advisory team members on the goals and objectives.			
Gain approval for conducting the workshop from relevant national or sub-national Government officials and determine optimal timing.			

<b>Participant List</b>	<i>Planning and Advisory Team Members</i>		
Create a participant list that includes a diverse range of stakeholders (e.g. government representatives, program managers, ECD experts) with knowledge of, or experience with, the home visiting system.			
Draft an invitation letter that defines the workshop goals and contains information about the timing and venue of the workshop.			
Receive guidance from Advisory team members on the list of participants and invitation letter.			
Finalize the list of participants and send out invitation letters.			
<b>Objective 3: Conduct Background Research (3 Months Before Workshop)</b>			
<b>Desk research on the home visiting program</b>	<i>Research Team Members</i>		
Gather and review relevant documents (e.g. key policy and program documents) on the home visiting program.			
<b>Key informant interviews (KIIs) and focus group discussions</b>	<i>Research Team Members</i>		
Identify a list of stakeholders (e.g. Ministry officials, frontline workers, supervisors) to be interviewed for the KII and Focus Group discussions.			
Develop KII and Focus Group protocols and adapt them to the relevant group of stakeholders to be interviewed (e.g. frontline workers will have a separate protocol from Ministry officials).			
Schedule and Conduct KIIs and Focus Group Discussions.			
<b>Synthesize Findings</b>	<i>Planning and Advisory Team Members</i>		
Synthesize and Review findings from the desk research and stakeholder interviews.			
Use findings to inform the focus and design of the workshop.			
<b>Objective 4: Develop workshop materials (2 Months before Workshop)</b>			
<b>Agenda for the workshop</b>	<i>Planning and Advisory Team Members</i>		
Develop a workshop agenda that defines the goals and objectives of the workshop and is informed by the results of the formative research.			
Receive guidance from Advisory team members on the agenda for the workshop.			

<b>Contextualize the Tool and Supplementary materials</b>	<i>Planning Team Members</i>		
Review the tool and ensure that it is appropriate for the context in which it will be used.			
<i>If applicable:</i> Translate the Tool and review for accuracy.			
Develop a comprehensive list of supplementary materials (e.g. Tool overview, reflection grids) for the Tool.			
Finalize workshop materials and complete all necessary printing.			
<b>Workshop Logistics (2-3 Months Before Workshop)</b>			
<b>Workshop venue</b>	<i>Planning Team Members</i>		
Select a workshop venue that has necessary equipment (e.g. projectors, flip charts) and sign a contract.			
Identify participant dietary restrictions and catering options.			
<i>If the workshop venue does not provide catering:</i> Identify and sign a contract with a catering company.			
<b>Miscellaneous expenses (optional but important)</b>	<i>Planning Team Members</i>		
Determine transportation logistics for participants (funds identified, sign-in sheets for participants developed, participants informed to keep receipts, etc.)			
<i>If applicable:</i> Arrange per diem for participants			