

Planning Template for Training Events

TASK		Suggested Timeline	Responsible Person	Due Date
Logistics – Site Selection & Coordination				
1.	Identify possible meeting sites based on projected number of participants, number of meeting rooms needed, etc.	6 months prior		
2.	Contact sites, request and compare site information.	5-6 months prior		
3.	Select a site.	5 months prior		
4.	Negotiate and sign contract with facility (including meeting rooms, registration table, AV equipment, food, and lodging).	4 months prior		
5.	Contact site and confirm numbers and logistics.	1-2 weeks prior		
6.	Create a plan/checklist for making the event environmentally friendly (green).	5-6 months prior		
7.	Check room set up, AV equipment, etc on site.	Day before and day of meeting		
Participant Recruitment and Communication				
8.	Develop a marketing plan.	5-6 months prior		
9.	Develop communication (brochure, electronic announcement, etc.) and registration form to announce the training event.	5-6 months prior		
10.	Advertise/Market the event to intended audience.	4-5 months prior		
11.	Intake and process registration forms.	2-3 months prior		
12.	Send confirmation packet to participants. If applicable conduct pre-assessment.	1-2 months prior		
13.	Create participant database.	1-2 months prior		
14.	Create nametags for training event.	1 -2 weeks prior		

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Training Design				
15.	Select meeting topic(s) based on local/state needs and national trends.	5-6 months prior		
16.	Decide upon an overall theme for the event.	5-6 months prior		
17.	Draft meeting goals, objectives, and identify intended audience.	5-6 months prior		
18.	Conduct needs assessment with members of target audience.	4-5 month prior		
19.	Meet with project staff to analyze needs assessment data and refine training objectives.	4-5 months prior		
20.	Conduct planning meetings with project staff to design agenda, identify possible keynote speaker/presenters.	4-5 months prior		
21.	Contact possible keynote speakers and presenters, as applicable.	4-6 months prior		
22.	Negotiate and prepare contract with selected speakers/presenters (provide meeting objectives, agenda and expectations).	4 months prior		
23.	Confirm keynote speakers/presenters and align presentation content with training agenda (via conference call(s) and by reviewing presentation content).	2-4 months prior		
24.	Make all travel/lodging arrangements for training staff and keynote speaker/presenters.	2-3 months prior		
25.	Develop content and design of meeting/training segments. Develop needed materials. Submit for approval, if applicable.	1-3 months prior		
26.	Develop a follow-up plan that includes strategies for providing technical assistance and support after the event.	1-3 months prior		
27.	Identify local staff to provide local examples during the meeting (if applicable).	1-3 months prior		
28.	Review resources and strategies related to the meeting topic from other states and communities and incorporate information into the meeting as appropriate.	1-3 months prior		
29.	Apply for CHES or other applicable continuing education credit as needed.	2-3 months prior		
30.	Finalize meeting agenda and materials.	1-3 months prior		
31.	Copy and collate all meeting materials.	1 week		
32.	Ship all meeting materials to training site.	5-7 days prior		
33.	Meet with all training staff members to review content, answer questions, review logistics, and provide facilitator training as needed.	Day before		
34.	Serve as facilitator/presenter at the meeting.	Day of the meeting		

TASK		Suggested Timeline	Responsible Person	Due Date
Evaluation				
35.	Develop and evaluation plan that includes the following steps: Step 1 – Gather background materials Step 2 – Identify who will make decisions Step 3 – Develop evaluation questions Step 4 – Decide how questions will be answered Step 5 – Construct a timeline	At least two months prior		
36.	Develop evaluation questionnaires and or interview protocols.	1-3 months prior		
37.	Collect pre-assessment and post-assessment evaluation data as indicated in the evaluation plan.	1-2 months prior		
38.	Summarize participant training evaluations and provide report to staff and key stakeholders.	1-2 weeks post meeting/training		
39.	Collect follow-up evaluation data as indicated in the evaluation plan.	Ongoing after training event		
40.	Tabulate and analyze evaluation data.	1 week post training event		
41.	Generate evaluation report.	1-2 weeks post training event		
42.	Use evaluation data <ul style="list-style-type: none"> • to inform/improve training design. • to provide follow-up intervention with participants. • to inform key stakeholders. 	Post-training		
Final Steps				
43.	Implement follow-up strategies as indicated in follow-up plan.	1-3 weeks post training		
44.	Use follow-up data to inform/revise training design.	Ongoing		
45.	Review master bill from training site – submit payment.	1-3 weeks post training		
46.	Submit payment and thank you note to speakers.	1-3 weeks post meeting		
47.	Celebrate!	often		