Training Event Checklist

- Target Audience is identified: ____________________________________________
- Assessment of Target Audience is completed and reviewed.
- Need/Purpose for training is clear: ______________________________________
- Title of training is agreed upon: _________________________________________
- Outcomes/Objectives are identified and agreed upon:
  ________________________________________________________________
  ________________________________________________________________
  ________________________________________________________________
  ________________________________________________________________
  ________________________________________________________________
  ________________________________________________________________
  ________________________________________________________________
  ________________________________________________________________
  ________________________________________________________________
- Costs have been projected, itemized, and approved.
  CEU (Continuing Education Units) fees:
  Equipment:
  Marketing:
  Materials/Supplies (books, worksheets, chart paper, markers, etc.)
  Printing:
  Refreshments/Meals:
  Rent:
  Speaker Fees:
  Special Accommodations:
  Travel:
  Other:
- Dates and Times agreed upon with principal participants/organizations, desired speakers and facility (check for possible scheduling conflicts such as holidays, vacations, established meeting times, etc.)
- Agenda created with topics and time allocations
- Speakers and trainers identified and confirmed. Collect necessary documentation from these individuals (i.e., resumes, short biographies, tax ID# applicable licenses or certifications, presentation outlines, etc.), give them necessary forms for documentation and payment (i.e., travel vouchers, applications payment processes, etc.) and receive specific instructions regarding room set-up/furnishings and equipment/supplies/personal needs
Training Event Checklist

- As applicable, CEUs (Continuing Education Units) application completed and submitted to applicable college/university/continuing education division.
- **List of responsibilities** of all persons who will be part of the preparation is prepared, communicated and dates for frequent check-in progress reported are set.
- **Prospective participant contact list** is established and placed in database for mailing labels and email communications.
- **Registration Forms and/or marketing letters/fliers** are mailed to prospect participants with specified dates for response, requests for CEUs (Continuing Education Units) and any special needs.
- **Equipment and supplies** needs and room set-up and furnishings (types of tables and chairs) preferences solicited and received from speakers/trainers.
- **Equipment and supply list** are completed and arrangements confirmed.
  - ✔ Microphones, audio speakers
  - ✔ Lecterns and podiums
  - ✔ VCR-TV
  - ✔ Projection Screen
  - ✔ Laptop Computer
  - ✔ LCD Projector
  - ✔ Overhead projector, extra light bulb
  - ✔ Audio Tape and/or CD player
  - ✔ Easels with specified charts (i.e. lined, squared, blank, adhesive strip etc.)
  - ✔ Check for special accommodations needed by speakers or participants (i.e. large type, Braille typewriter, special hearing devices, ASL or ESL interpreters)
  - ✔ Other: (i.e. stopwatch)
- **Training materials list** is completed and necessary orders placed.
  - ✔ Books, curriculums or other published materials ordered.
  - ✔ Handouts received and copied.
  - ✔ Presentation supplies such as binders, folders, pens, markers, charts, paper, clips, masking tape, post-it notes, index cards, yardsticks, etc.
  - ✔ Other:
- **Additional supplies list** is completed and supplies assembled.
  - ✔ Name badges or name tents
  - ✔ Sign-in forms
  - ✔ Completion certificates
  - ✔ Evaluation forms
  - ✔ Other:
Training Event Checklist

- **Registrations** received, collated and as applicable, payments documented. Count changes made for supplies, food arrangement, etc.
- **Payment deposits** made and documented.
- **Room set-ups** as specified by speakers/trainers are confirmed with facility coordinator.
- **All facility arrangements** are completed and confirmed.
- **Participant names** placed on name badges or name tents (as applicable).
- **Participant packets** are assembled (as applicable).
- **All transferable equipment, supplies and materials** are organized, boxed and transported to facility.
- **Registration table** is set-up with necessary supplies.
- **Last minutes before start-up time, check-in with speakers/trainers** to make sure all equipment, supplies, materials and room set-up is according to specifications. Also, do a final check-out on food arrangements.

THE HAPPENING!!!

Training is being implemented—*stay in touch with what is happening and what spontaneous needs may arise from presenters or participants.*

- **Participant evaluations** collected, summarized, and discussed.
- **Debrief training impact**—successes, pitfalls, and areas for improvement and list suggestions for future follow-along.
- **Complete any necessary or promised follow-along.**
  - ✓ Thank-you notes to speakers, volunteers, etc.
  - ✓ Payments to vendors of services and supplies
  - ✓ Payments to speakers/trainers for presentations, per-diem and travel
  - ✓ Return any borrowed materials, furnishings, supplies, and equipment
  - ✓ Follow-along notes to participants

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Handout #3

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