

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**

Handout #3

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Supporting Diverse Customers to Employment Success Project, Community Support Alliance at the Center for Development and Disability,
University of New Mexico. Funded by the Employment and Training Administration of the US Department of Labor

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- 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:_____*

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- **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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