APPENDIX B: LOGISTICS PLANNING WORKSHEET

Directions

For each step listed in the left-hand column, think about—

- Who will be responsible for completing the step;
- What needs to be done;
- Where it will be done;
- When it will be done; and
- How it will be done.

Fill in the appropriate information prior to the training.

	Who	What	Where	When	How
Identify and Address Participants' Needs (at least 3 months before the training)					
Identify an appropriate group of participants for the training.					
Work with intended audience as appropriate to choose a date and time for the training.					
Think about how to schedule time for participants to network (e.g., during lunch). Although there is some time built into NTC trainings for participants to share ideas and resources, many participants will want additional time to "catch up" with their colleagues.					
Send a marketing flier along with an application form to potential participants.					

Appendix B (continued)

	Who	What	Where	When	How
Have participants fill out and submit an application form, which contains their contact information, relevant background and experience, and their expectations for the training.					
If you wish to offer continuing education credits for participants in this training, submit the necessary materials to the accreditation body.					
Prepare To Facilitate the Training (2 weeks before the training)					
Consider facilitating the training in a team of two or more people. The team should have at least one person who has experience with the training topic and at least one person with skills and experience delivering training to diverse groups of adults.					
Review the lesson plans for delivering the training (i.e., rehearsal).					
Read the Facilitation Guidelines and Teaching Strategies Resource Sheet #16 and #17, and spend some time thinking about how to incorporate these suggestions into the training.					

Appendix B (continued)

	Who	What	Where	When	How
In your mind, walk through the activities until you feel comfortable with how to lead them. You may wish to practice out loud, in front of a mirror, with a tape recorder, or with friends or colleagues.					
Secure needed equipment, materials, and supplies. Prepare charts, handouts, participant manual, and transparencies. Note: Prepare transparencies that use simple visuals, one idea per visual, and large print.					
Make copies of handouts so that each participant has a complete set.					
If you have participants fill out and submit their application forms prior to the training, make a list of their expectations on newsprint.					
Create a list of participants' names and contact information (addresses, phone numbers, fax numbers, and e-mail addresses, if applicable) to hand out during the training.					
Create certificates of completion for each training participant.					

Appendix B (continued)

	Who	What	Where	When	How
Check Training Room Setup and Equipment (day before the Training)					
Set up the training room so that participants can see each other (e.g., in a circle) and move freely around the room.					
Decorate room.					
Check outlets, light switches, projection screen, acoustics.					
Test equipment (e.g., overhead projector, microphone.) Note: If possible, identify an audiovisual assistant.					
Secure spare bulbs, extension cords, masking tape, newsprint, transparency pens, transparencies.					
Display sign-up sheets and name badges on table.					
Noise check (e.g., make sure noise from adjacent rooms is not heard).					

Appendix B (continued)

	Who	What	Where	When	How
Deliver the Training (day of the training)					
Greet the audience.					
Interact with the audience (e.g., any questions? can everyone see? can everyone hear?).					
Review agenda, identify location of bathrooms, smoking areas, telephone, and restaurants.					
Give each participant a copy of all transparencies and handouts used for delivering the training.					
Facilitate the training according to the lesson plans provided.					
Hand out the participant list so that participants can continue to share ideas and resources after the training.					
Have participants complete the training evaluation form. You will most likely need to submit evaluation forms (or an overall evaluation report) for participants who wish to receive continuing education credits.					

Appendix B (continued)

	Who	What	Where	When	How
Complete Post-Training Activities (within 1 to 2 weeks the of training)					
Review participants’ evaluation forms, and think about ways to improve your facilitation skills for future trainings.					
If you cofacilitated the training, take time to “debrief”—to discuss with your cotrainer what went well, what you could improve upon in the future, and how you worked together.					
If you secured continuing education credits for the training, mail materials to the accrediting organization.					