

# **Training Checklists version 1**

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## **NOTE TO TRAINER**

The checklists included in this document are intended to be used with the NTI Toolkits to facilitate trainings based on topics covered in the NTI Modules. Please see the document titled "Guidelines for Using the NTI Curriculum Materials" for more about how to use the training materials. In brief, the NTI curriculum materials include the following:

- Training checklists and templates:
  - Facility Checklist
  - Training Implementation and Logistics Checklist
  - Supplies and Equipment Checklist
  
- Fifteen research-based modules
  
- Toolkits for training on Module topics and subtopics, and each featuring:
  - Cover page
  - Preparation checklist for the necessary curriculum materials, activity preparation, and equipment specific to each training topic
  - Course overview
  - Trainer's outline
  - Participant materials, including activities, instructions, and answer keys
  - Slide presentation

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## TRAINING CHECKLISTS

The following checklists are intended to assist you while you prepare and implement your training:

- **Facility Checklist**

Use this checklist to evaluate a potential training site for your training session. You can use this checklist when you make an initial telephone call inquiring about a possible training location and/or when you make the essential site-based visit. Place a checkmark in the appropriate column indicating whether or not the facility has the individual feature listed. There is an additional column for any comments.

- **Training Implementation and Logistics Checklist**

Use this checklist to begin making arrangements for your training and to guide you through the training process starting at two to six months before training through two weeks after the training. Place a checkmark in the box next to each task after it has been completed<sup>1</sup>.

- **Supplies and Equipment Checklist**

Use this checklist to ensure that you have the necessary supplies and equipment for your training. Place a checkmark in the box next to the items you will need to take to your training.

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<sup>1</sup> This checklist is designed under the assumption that you have already done an audience analysis. For more information, see NTI's *Building Curriculum Development and Training Skills* Training Module.

**FACILITY CHECKLIST**

Instructions for using this checklist: Use this checklist to evaluate a potential training site for your training program. You can use this checklist when you make an initial telephone call inquiring about a possible training location and/or when you make the essential site-based visit. Place a checkmark in the appropriate column indicating whether or not the facility has the individual feature listed. There is an additional column for any comments.

**Course Title:** \_\_\_\_\_ **Course Date:** \_\_\_\_\_

	Yes	No	Comments
<b>Building</b>			
Bathrooms: clean near training room			
Emergency/fire exits clearly marked			
Signs designating building and rooms			
Handicap accessible			
Housekeeping services available			
Security services available			
Keys needed for outside doors			
Parking: available close and safe; well-lit if training after dark affordable			
Phones: local long distance			
No-smoking policy			
Vending machines/snack area			
Water fountain			
<b>Training Room(s)</b>			
Space: adequate size available breakout rooms			
General condition: clean pleasant places to hang wall charts			
Seating: adequate number of chairs comfortable chairs movable chairs enough room for chairs to fit under tables			

<p>Tables:  adequate number for participants  table linens/modesty screens  table and/or podium for speakers  adequate space for participants' materials  adequate writing space  flexible table arrangements  extra table available for registration  availability of extra tables for displays</p>			
<p>Lighting:  overhead lighting adequate  shades and/or blinds operable  switches/dimmers operable  windows</p>			
<p>Acoustics:  adequate sound amplification  sound from other rooms</p>			
<p>Temperature:  ability to control temperature  air-conditioning adequate  heating adequate</p>			
<p>Audiovisual equipment:  audiovisual assistance available  overhead projector  extra bulb for projector  Internet connection  screen  slide carousel  slide projector  VCR/television monitor  laptop computer  LCD projector  extension cord  other audiovisual equipment:</p>			
<p>Other equipment:  flip charts and easels  white/chalk board  markers/ chalk  wastebaskets  coat rack</p>			
<p>Breaks/refreshments:  adequate space  adequate tables, chairs  electrical outlets available for coffee, etc.  refrigerator available  sink available  area far enough away so doesn't disturb training</p>			
<p>Social/cultural issues:  any items which are insensitive to gender, age,  race, religious issues, special needs</p>			

## TRAINING IMPLEMENTATION AND LOGISTICS CHECKLIST

**Instructions:** Use this checklist to begin making arrangements for your training and to guide you through the training process starting at two to six months before training through two weeks after the training. Place a checkmark in the box next to each task after it has been completed.

**Course Title:** \_\_\_\_\_ **Course Date:** \_\_\_\_\_

Time	Task
<b>Two to Six Months Before Training</b>	<input type="checkbox"/> Tour training facility/classroom and rate its suitability using the <i>Facility Checklist</i> .
<b>Two Months Before Training</b>	<input type="checkbox"/> Reserve or confirm availability of training facility and/or classroom. <input type="checkbox"/> Determine and confirm participation of guest speakers/trainers or other facilitators (if applicable); review roles and responsibilities and request guests and others provide training materials to you at least two weeks before training date. <input type="checkbox"/> Send marketing materials to potential participants (include information about dates and times, location with directions, tentative agenda, list of topics to be covered, and a short enrollment form to obtain information about participants' levels of education, experience and current job responsibilities, if not already available).
<b>One Month Before Training</b>	<input type="checkbox"/> Make arrangements for refreshments and meals (as necessary). <input type="checkbox"/> Supplement Trainer's Outline, Overview of Training Session, participant's packet, and PowerPoint Presentation (as necessary). <input type="checkbox"/> Order training materials and reserve supplies and equipment (as necessary). <input type="checkbox"/> Develop drafts of any additional audiovisuals and training materials. <input type="checkbox"/> Complete <i>Supplies and Equipment Checklist</i> . <input type="checkbox"/> Develop and send training materials and audiovisuals to guest speakers or other trainers (as necessary).
<b>Two Weeks Before Training</b>	<input type="checkbox"/> Confirm receipt of training materials and audiovisuals from guest speakers or other trainers (as necessary). <input type="checkbox"/> Confirm receipt of training materials, supplies and equipment previously ordered (as necessary). <input type="checkbox"/> Revise and produce any additional training materials. <input type="checkbox"/> Review and follow suggested tasks on <i>Preparation Checklist</i> .
<b>One Week Before Training</b>	<input type="checkbox"/> Write instructions for training activities on flipchart and/or overhead or slide. <input type="checkbox"/> Confirm arrangements for refreshments and meals (as necessary). <input type="checkbox"/> Make copies of participant's packets, including assessments, evaluation forms, training activities, etc. Be sure to make extra copies.
<b>One or Two Days Before Training</b>	<input type="checkbox"/> Prepare tent cards (as necessary). <input type="checkbox"/> Purchase and pack refreshments (as necessary). <input type="checkbox"/> Assemble and pack participant's packets (including assessments and evaluation forms) and training materials (e.g., reference materials, training manuals, wall charts, audiovisuals, supplies and equipment according to the <i>Supplies and Equipment Checklist</i> prepared earlier).

Time	Task
<b>Day of the Training: Preparation</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Arrive early.</li> <li><input type="checkbox"/> Arrange the training room in a manner conducive to your training purpose, (e.g., lecture/presentations, group discussions, skills demonstrations, etc.). Consider alternatives to the standard row arrangement of many classroom settings, such as: a horseshoe or U-shape, or several round tables with 3-5 participants seated at each and facing the front.</li> <li><input type="checkbox"/> Set up and test A-V equipment (e.g., overhead/slide projector and screen, flipchart and whiteboard).</li> <li><input type="checkbox"/> Check to make sure all participants will be able to view audiovisuals.</li> <li><input type="checkbox"/> Place on the walls and around the room any informational materials needed for the session (e.g., wall charts such as Housekeeping Information, Parking Lot for Questions, Star Gazing, etc.)</li> <li><input type="checkbox"/> Set up trainer's table (e.g., training materials, pen, pencil, markers, timer, etc.)</li> <li><input type="checkbox"/> Set up registration table (e.g., sign-in sheet, markers, name tags/tent cards, materials, etc.)</li> <li><input type="checkbox"/> Place tent cards, training materials (e.g., participant's packets, necessary supplies, etc.) at each participant's place.</li> <li><input type="checkbox"/> Place reference materials in an accessible location (as needed).</li> <li><input type="checkbox"/> Set up any refreshments.</li> <li><input type="checkbox"/> Place sign at entrance to indicate training room number.</li> </ul>
<b>At the Start of the Session</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Start the session on time.</li> <li><input type="checkbox"/> Welcome participants and introduce trainers.</li> <li><input type="checkbox"/> Mention pertinent wall charts.</li> <li><input type="checkbox"/> Conduct a content-related opening activity.</li> <li><input type="checkbox"/> Conduct an icebreaker if participants do not know one another.</li> <li><input type="checkbox"/> Administer a pre-test or assessment.</li> <li><input type="checkbox"/> Review Course Overview.</li> <li><input type="checkbox"/> Present and discuss training objectives.</li> <li><input type="checkbox"/> Review organization and layout of the training manual or other materials (as needed).</li> </ul>
<b>During the Session</b>	<p><b>Training Content</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide accurate information.</li> <li><input type="checkbox"/> Provide useful information.</li> <li><input type="checkbox"/> Clearly communicate <i>Overview of Training Session</i>.</li> <li><input type="checkbox"/> Clearly communicate learning objectives.</li> </ul> <hr/> <p><b>Methods and Media</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Use methods and media based on the training objectives.</li> <li><input type="checkbox"/> Use methods and media based on the audience analysis.</li> <li><input type="checkbox"/> Use methods and media with differing levels of participant involvement.</li> <li><input type="checkbox"/> Use methods and media that are feasible as far as cost, availability, and time.</li> </ul>

Time	Task
<p><b>During the Session (continued)</b></p>	<p><b>Training Activities</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Incorporate training activities (e.g., case studies, skills demonstrations, small group discussions, games, etc.) that directly support the training objectives.</li> <li><input type="checkbox"/> Provide an effective introduction at the start of each presentation or activity.</li> <li><input type="checkbox"/> Conduct demonstrations in a patterned sequence (e.g., tell, show, coach, supervise).</li> <li><input type="checkbox"/> Provide examples and analogies to help participants understand new materials.</li> <li><input type="checkbox"/> Use activities that directly relate to the participants' job responsibilities.</li> <li><input type="checkbox"/> Provide an effective summary at the end of each presentation or activity.</li> <li><input type="checkbox"/> Provide effective transitions between topics for better understanding and application.</li> <li><input type="checkbox"/> Periodically evaluate participants' progress and provide timely and appropriate feedback to guide their development.</li> <li><input type="checkbox"/> Provide periodic breaks using the 90/20/8 "rule".</li> </ul> <p><b>Delivery of Content</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Speak with enthusiasm.</li> <li><input type="checkbox"/> Project your voice so all can hear.</li> <li><input type="checkbox"/> Speak in a clear, professional, pleasant manner.</li> <li><input type="checkbox"/> Make sure word choice is appropriate for audience.</li> <li><input type="checkbox"/> Vary the pace of your voice; add pauses when needed.</li> <li><input type="checkbox"/> Maintain eye contact with participants, and use gestures that facilitate (rather than detract from) learning.</li> </ul> <p><b>Facilitation Techniques</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Use participants' names.</li> <li><input type="checkbox"/> Ask questions and encourage participants to ask questions.</li> <li><input type="checkbox"/> Answer questions appropriately when asked.</li> <li><input type="checkbox"/> Repeat participants' questions so all can hear them.</li> <li><input type="checkbox"/> Strive to make sure all participants are equally engaged in training activities (e.g., hesitant participants are drawn out and verbose ones are discouraged kindly).</li> <li><input type="checkbox"/> Handle behavioral problems with participants appropriately (as necessary).</li> </ul>
<p><b>At the End of the Session:</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Administer a post-test or learning assessment.</li> <li><input type="checkbox"/> Distribute "Evaluation of Trainer Form".</li> <li><input type="checkbox"/> Conduct a meaningful and effective closing activity.</li> </ul>
<p><b>Within Two Weeks After the Training</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Review and compile evaluation responses.</li> <li><input type="checkbox"/> Write thank you notes to guest speakers and volunteers (if any).</li> <li><input type="checkbox"/> Contact participants to follow-up on questions or concerns.</li> <li><input type="checkbox"/> Write evaluation summary and note recommended revisions for the training (if any).</li> </ul>

## SUPPLIES AND EQUIPMENT CHECKLIST

Instructions for completing this checklist: Use this checklist to ensure that you have the necessary supplies and equipment for your training. Place a checkmark in the box next to the items that you will need to take to your training.

**Course Title:** \_\_\_\_\_ **Course Date:** \_\_\_\_\_

### Supplies:

- |   |   |
|---|---|
| <input type="checkbox"/> Audiovisuals (overhead transparencies, videotapes, etc.) | <input type="checkbox"/> Pencils  |
| <input type="checkbox"/> Bell or clicker  | <input type="checkbox"/> Pens   |
| <input type="checkbox"/> Blank overhead transparencies                            | <input type="checkbox"/> Reference materials                            |
| <input type="checkbox"/> Blank paper  | <input type="checkbox"/> Scissors                                       |
| <input type="checkbox"/> Candy (sugar free, low calorie)                          | <input type="checkbox"/> Self-sticking dots (various sizes and colors)  |
| <input type="checkbox"/> Chalk  | <input type="checkbox"/> Self-sticking notes (various sizes and colors) |
| <input type="checkbox"/> Dry erase and magic markers                              | <input type="checkbox"/> Stapler  |
| <input type="checkbox"/> Envelopes  | <input type="checkbox"/> Stress reducers (e.g., clay)                   |
| <input type="checkbox"/> Erasers  | <input type="checkbox"/> Tape—masking and scotch                        |
| <input type="checkbox"/> Flipchart pads and easels (2)                            | <input type="checkbox"/> Tent cards                                     |
| <input type="checkbox"/> Handouts and response cards                              | <input type="checkbox"/> _____  |
| <input type="checkbox"/> Index cards (3 x 5)                                      | <input type="checkbox"/> _____  |
| <input type="checkbox"/> Name tags  | <input type="checkbox"/> _____  |
| <input type="checkbox"/> Notepads (8 ½ x 11)                                      | <input type="checkbox"/> _____  |
| <input type="checkbox"/> Paper clips  | <input type="checkbox"/> _____  |
| <input type="checkbox"/> Paper cups   | <input type="checkbox"/> _____  |
| <input type="checkbox"/> Pencil sharpener   |   |

### Equipment (if not provided at training facility):

- |  |   |
|--|---|
| <input type="checkbox"/> Extensions cord(s)                              | <input type="checkbox"/> Television and VCR |
| <input type="checkbox"/> Laptop  | <input type="checkbox"/> _____              |
| <input type="checkbox"/> LCD projector                                   | <input type="checkbox"/> _____              |
| <input type="checkbox"/> Overhead projector and extra bulbs              | <input type="checkbox"/> _____              |
| <input type="checkbox"/> Screen  | <input type="checkbox"/> _____              |
| <input type="checkbox"/> Slide projector, slide carousel and extra bulbs |   |