TEN TIPS FOR ORGANIZING A GREAT TRAINING

*Your Guide to Planning and Executing a Successful Fellows Kick-Off*

**Step 1: Establish Goals and Determine Audience**

Your first step is figuring out what organizational objective you want to achieve for your training. From there, you can identify your resulting audience. For example, if your primary objective is to get more people in the door who can take action with your chapter, your resulting audience would be supporters who are not yet volunteers or who have started volunteering very recently.

**Step 2: Create a Training Team**

The biggest mistake you can make is to think you can organize and execute a great training on your own. What roles will you need to fill to plan and execute your training well? Below are some options - enlist volunteers to fill as many as make sense.

* Training lead (that’s you!)
* Location Coordinator
* Food Coordinator
* Breakout Coordinator
* Printing/Packets Coordinator
* Cleanup Coordinator
* Sign-in Coordinator
* Time Keeping Coordinator

In addition to filling these logistical roles, you also need multiple trainers. We recommend that you recruit at least one trainer for each module (or section). For example, if your Fellows Kick-Off has 4 modules, you should have at least four trainers. This helps keep the workload light for each trainer as well as gives participants exposure to a diverse set of voices, rather than just one person.

**Step 3: Develop Skeletal Agenda**

You know what your objectives are, you know what curriculum is available, and you have built a solid training team. Determine the duration of your training and the best logical order for training sessions. Then, assign trainers to modules. Fill in your skeletal agenda below:

|  |  |  |  |
| --- | --- | --- | --- |
| **Start Time** | **End Time** | **Module** | **Trainer** |
|  |  | *Welcome and Introductions* |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  | *Debrief, Next Steps, Closing* |  |

**Step 4: Take Care of Logistics**

At the end of this document, you’ll find a sample “Taskmaster,” a worksheet for listing every single thing that needs to happen before the training, by when it needs to happen, and who is responsible. Convene a meeting with your Training Team to talk through all of these tasks and assign out ownership. Make sure you’re thinking of everything in terms of food, supplies, and the venue.

**Step 5: Recruit Participants**

Recruiting for a training is just like recruiting for any other event - we have to make hard asks, recruit twice as many people as our attendance goal, and make multiple rounds of confirmation calls and emails, and make hard asks. If yours is a Recruitment training (designed to bring in new people as opposed to developing skills of experienced volunteers), use your social networks and email list to recruit heavily for your training. Keep one rule in mind: if your training is longer than four hours, it’s probably going to take more than 3-4 days’ notice to get people to commit to attending, so recruit early and often!

**Step 6: Customize Curriculum**

Every module is designed to be tailored to your state, so make a plan to go through all the materials and customize them as needed. You can do this yourself or delegate it to the trainers assigned to each module - just remember that ultimately you, the Training Lead, are responsible for making sure it is done! The last thing you want to have happen is to see a PowerPoint slide come up with the text “Insert local example here” on the day of your training!

You can also customize your material to be issue-specific or, in a pinch, to be facilitated without access to a projector or without access to a printer.

**Step 7: Practice Training Sessions**

This cannot be emphasized enough. Every trainer should practice with an audience at least 3 times, in addition to practicing at home. Please see Attachment 3: From Receiving Curriculum to Delivering an Effective Session: How to Prepare for tips you can provide to your trainers to help them master the material.

**Step 8: Confirm Participants and Logistics**

Your team should do two rounds of confirmation calls as well as two emails with all the logistical information leading up to the training event. You should also check in with your Training Team often to make sure everyone is on track with their assigned responsibilities.

**Step 9: Train!**

Take lots of pictures, and tweet them with the hashtag #OFAFellows!

**Step 10: Celebrate, Evaluate, Learn and Improve**

Make sure to collect an evaluation from all participants, as well as have an immediate debrief discussion with your training team right after the training, as well as a more extended debrief a few days later. Take note of your key lessons and takeaways, apply them to your next training, and keep getting better at what you already do amazingly!

**Training Taskmaster Worksheet**

Before your trainings, write out a “Task Master” that clearly outlines every single task that needs to be completed before the training with associated deadlines and persons responsible.The Training Lead is in charge of checking in with all leads to make sure that tasks are completed on time and comprehensively.

|  |  |
| --- | --- |
| **Training Roles** | |
| **Role:** | **Name:** |
| Training Lead |  |
| Location Coordinator |  |
| Food Coordinator |  |
| Breakout Coordinator |  |
| Binder/Printed Materials Coordinator |  |
| Cleanup Coordinator |  |
| Sign in/office supplies Coordinator |  |
| Timekeeper |  |

The taskmaster below includes some important typical tasks, but you may need to add additional tasks - this is only a starting point. Additionally, this is an ideal timeline, but your timeframe may be compressed. Fill in the due dates that make sense for you and your team, building in buffer time for snags and delays.

|  |  |  |  |
| --- | --- | --- | --- |
| **Task** | **Date** | **Person Responsible** | **Status** |
| Date Confirmed | 3 weeks out (date: ) |  | Complete  Incomplete  Pending |
| Training team confirmed | 3 weeks out (date: ) |  |  |
| Meet with training team to assign out responsibilities | 3 weeks out (date: ) |  |  |
| Training Goals established and sent to training team | 3 weeks out (date: ) |  |  |
| Location locked down and sent to training team | 2 weeks out (date: ) |  |  |
| Training entered in BarackObama.com | 2 weeks out (date: ) |  |  |
| Heavy recruitment begins | 2 weeks out (date: ) |  |  |
| Agenda established and sent to training team | 2 weeks out (date: ) |  |  |
| Trainers assigned to modules | 1 week out (date: ) |  |  |
| Email training team logistical information | 1 week out (date: ) |  |  |
| Meet with training team and trainers to review agenda, logistics, and progress on tasks | 1 week out (date: ) |  |  |
| Food vendors called, estimates sent to staff point of contact | 1 week out (date: ) |  |  |
| Secure Projector and cords, if not included with venue | 1 week out (date: ) |  |  |
| Curriculum finalized and shared with training team and trainers | 5-7 days out (date: ) |  |  |
| Trainers practice with peers | 5 days out (date: ) |  |  |
| List of participants finalized | 5 days out (date: ) |  |  |
| Purchase any supplies you don’t already have | 5 days out (date: ) |  |  |
| Email logistics to attendees | 3-5 days out (date: ) |  |  |
| Determine who is assigned to what breakout workshop, if any | 3-5 days out (date: ) |  |  |
| Complete all printing from master checklist | 3 days out (date: ) |  |  |
| Assemble folders with printed materials | 2 days out (date: ) |  |  |
| Staffing grid (with day-of logistics roles assigned) created and shared with training team | 2 days out (date: ) |  |  |
| Dry run with all trainers (dress rehearsal style) | 1-2 days out (date: ) |  |  |
| Pickup food (snacks, water, etc) | 1 day out (date: ) |  |  |
| Location walk-through | 1 day out (date: ) |  |  |
| Final Review of Annotated Agenda and breakout sequences with all trainers | 1 day out (date: ) |  |  |
| Training lead walks all coordinators through master training checklist for one last time | 1 day out (date: ) |  |  |
| Pack supplies box with everything in packing checklist | Night before (date: ) |  |  |
| Day-of food pickup (coffee, lunch, etc) | Day of, 2 hours before start time |  |  |
| Training venue unlocked | Day of, 2 hours before start time |  |  |
| Early morning training team huddle to review staffing grid and who is responsible for what throughout the day | Day of, 2 hours before start time |  |  |
| Timekeeper has their watch and printed agenda | Day of, one hour before start time |  |  |
| Sign-in table set up | Day of, one hour before start time |  |  |
| Ppt projector set up | Day of, one hour before start time |  |  |
| Lunchtime mid-training evaluation - how is it going and what do we need to adjust? | Day of, Lunch time |  |  |
| Post-training on-site debrief discussion | Day of, Within one hour of end of training |  |  |
| Comprehensive debrief discussion with training team | Within 3 days after training |  |  |