Comprehensive Training Preparation Checklist for Public Health Trainers

Feel like you're forgetting something when planning a training? This comprehensive checklist has you covered. *Customize it - delete items that don't apply or include personalized details* - to create your own unique guide. Never miss that critical detail again!

Phase 1: Initial Planning & Organization

Foundation Setup

- [ ] **Confirm training basics**
    - [ ] Date and time (include time zone)
    - [ ] Duration (start/end times with buffer time)
    - [ ] Location/platform confirmed and reserved
    - [ ] Training title finalized
    - [ ] Learning objectives written and approved

- [ ] **Establish key contacts**
    - [ ] Primary contact at your organization (name, phone, email)
    - [ ] Venue/facility contact (name, phone, email)

- [ ] **Define team roles and responsibilities**
    - [ ] Lead Facilitator (content delivery, primary participant interaction)
    - [ ] Co-Facilitator/Support Trainer (backup, small group support)
    - [ ] Materials Manager (printing, distribution, supplies)
    - [ ] Registration Coordinator (attendee management, check-in)
    - [ ] Technical Support (AV setup, troubleshooting, platform management)
    - [ ] Communications Lead (promotion, participant emails)
    - [ ] Evaluation Specialist (survey creation, data collection/analysis)

- [ ] **Create training description**
    - [ ] Written for target audience
    - [ ] Includes learning objectives
    - [ ] Specifies format and duration
    - [ ] Ready for promotional use

Phase 2: Audience Analysis & Registration

Understanding Your Participants

- [ ] **Define primary audience**
    - [ ] Job roles and responsibilities
    - [ ] Experience levels (entry, mid-level, senior)
    - [ ] Department/unit affiliations
    - [ ] Facility types (hospital, clinic, LTC, etc.)
- [ ] **Conduct needs assessment**

- [ ] Identify training drivers (regulatory, outbreak response, skill gaps)
- [ ] Document specific challenges participants face
- [ ] Assess prior training/experience in topic area
- [ ] Determine performance measurement methods currently used

[ ] **Gather logistical preferences**
- [ ] Preferred days/times for target audience
- [ ] Shift work or scheduling constraints
- [ ] Seasonal considerations (flu season, vacation periods)
- [ ] Accessibility needs

Registration System

[ ] **Determine registration requirements**
- [ ] Decide if registration is required
- [ ] Set registration capacity limits
- [ ] Establish registration deadlines

[ ] **Set up registration system**
- [ ] Choose platform (Eventbrite, Google Forms, Zoom registration, etc.)
- [ ] Configure registration questions:
  - [ ] Full name
  - [ ] Contact information (email, phone)
  - [ ] Job title and department
  - [ ] Organization/facility name
  - [ ] Experience level with training topic
  - [ ] Accessibility accommodations needed
  - [ ] Dietary restrictions (if food provided)
  - [ ] Preferred session (if multiple offerings)

[ ] **Test registration system**
- [ ] Complete test registration
- [ ] Verify confirmation emails work
- [ ] Check data collection and export functions

Phase 3: Content Planning & Design

Training Content Development

[ ] **Design learning experience**
- [ ] Map content to learning objectives
- [ ] Sequence activities for optimal learning flow
- [ ] Balance presentation, interaction, and practice time
- [ ] Plan for different learning styles and preferences

[ ] **Develop training agenda**
- [ ] Create participant agenda (high-level timing and activities)
- [ ] Design opening and closing activities
- [ ] Plan break timing and duration
- [ ] Build in buffer time for discussions and questions

[ ] Include time for evaluation completion

[ ] **Plan engagement strategies**
- [ ] Select icebreakers and energizers
- [ ] Design small group activities and discussions
- [ ] Prepare interactive elements and participation methods
- [ ] Plan movement breaks and attention management

Phase 4: Communications Planning

Promotional Strategy

[ ] **Develop promotion plan**
- [ ] Identify target channels (email lists, social media, internal communications)
- [ ] Create promotional timeline (initial announcement, reminders, final call)
- [ ] Design promotional materials (flyers, email templates, social posts)
- [ ] Determine who will distribute promotions

[ ] **Create promotional content**
- [ ] Training description
- [ ] Registration instructions and link
- [ ] Key benefits for participants
- [ ] Contact information for questions

Participant Communications

[ ] **Plan participant communication sequence**
- [ ] Registration confirmation (immediate)
- [ ] Pre-training information (1-2 weeks before)
- [ ] Final reminders (2-3 days before)
- [ ] Day-of logistics (morning of training)
- [ ] Post-training follow-up (within 1 week)

[ ] **Develop communication templates**
- [ ] Registration confirmation with key details
- [ ] Pre-training preparation email (materials, tech requirements, location)
- [ ] Reminder email with logistics and expectations
- [ ] Thank you/follow-up email with resources

Phase 5: Venue & Technical Setup

In-Person Training Space

- [ ] **Confirm venue requirements**
    - [ ] Room capacity adequate for expected attendance plus 10-15% buffer
    - [ ] Layout accommodates planned activities (movement, small groups)
    - [ ] Wall space available for posting materials
    - [ ] Climate control accessible
    - [ ] Proximity to restrooms and break areas
    - [ ] Parking availability and accessibility
- [ ] **Arrange room setup**
    - [ ] Table configuration specified (rounds, classroom, U-shape, etc.)
    - [ ] Chair count confirmed
    - [ ] Power outlet locations identified
    - [ ] Lighting is adequate for all activities

- [ ] **Coordinate audio-visual needs**
    - [ ] Projector and screen confirmed
    - [ ] Laptop connection tested (HDMI, adapters available)
    - [ ] Microphone system (wireless preferred for mobility)
    - [ ] Speakers for audio/video content
    - [ ] Extension cords and power strips
    - [ ] Backup equipment identified

Virtual Training Platform

- [ ] **Platform setup and testing**
    - [ ] Training platform confirmed (Zoom, Teams, etc.)
    - [ ] Meeting/webinar created and configured
    - [ ] Co-host permissions assigned
    - [ ] Recording settings configured
    - [ ] Breakout room capabilities tested

- [ ] **Technical requirements communicated**
    - [ ] Minimum internet speed requirements
    - [ ] Required software versions
    - [ ] Camera and microphone recommendations
    - [ ] Phone dial-in option provided as backup

- [ ] **Interactive features tested**
    - [ ] Screen sharing capabilities
    - [ ] Polling or survey integration
    - [ ] Chat functionality and moderation
    - [ ] File sharing methods

Phase 6: Content & Materials Development

Materials Management

[ ] **Create detailed run of show**
- [ ] Minute-by-minute facilitator guide developed
- [ ] All transitions and timing specified
- [ ] Materials needed for each segment listed
- [ ] Contingency plans for common scenarios included
- [ ] Staff roles and responsibilities detailed for each activity

[ ] **Prepare presentation materials**
- [ ] Slides created and reviewed
- [ ] Interactive elements incorporated
- [ ] Backup slides for common questions
- [ ] Handouts and worksheets finalized

Materials Management

[ ] **Create comprehensive materials list**
- [ ] All items needed with quantities
- [ ] Responsible person assigned for each item
- [ ] Printing specifications documented
- [ ] Backup quantities planned

[ ] **Organize participant materials**
- [ ] Determine distribution method (packets, digital, hybrid)
- [ ] Organize materials in logical sequence
- [ ] Include reference materials for post-training use
- [ ] Prepare extra copies (10-15% above registration)

[ ] **Gather supplies and equipment**
- [ ] Presentation materials (laptop, clicker, adapters)
- [ ] Participant supplies (pens, paper, name tags)
- [ ] Activity materials (sticky notes, markers, flip chart paper)
- [ ] Comfort items (tissues, water, fidget toys)
- [ ] Emergency supplies (first aid kit, contact list)

Phase 7: Evaluation Planning

Evaluation Strategy

[ ] **Define evaluation objectives**
  [ ] What specific outcomes will you measure?
  [ ] How will results inform future training improvements?
  [ ] What data collection methods will you use?

[ ] **Create evaluation instruments**
  [ ] Session feedback form (satisfaction, relevance, clarity)
  [ ] Knowledge assessment (pre/post if applicable)
  [ ] Confidence or skill self-assessment
  [ ] Implementation planning questions

[ ] **Plan data collection**
  [ ] Distribution method determined (digital, paper, verbal)
  [ ] Collection timeline established
  [ ] Data storage and analysis plan created
  [ ] Responsible person assigned

Follow-up Evaluation

[ ] **Long-term follow-up planned**
  [ ] 30, 60, or 90-day follow-up survey designed
  [ ] Implementation support resources identified
  [ ] Method for tracking behavior change established

Phase 8: Final Preparations

Pre-Training Rehearsal

[ ] **Schedule dress rehearsal meeting**
  [ ] Full training team meeting scheduled 3-5 days before training
  [ ] All team members are required to attend
  [ ] Meeting agenda includes a full run-through of the training flow
  [ ] Time allocated for questions and adjustments

[ ] **Conduct dress rehearsal**
  [ ] Walk through the entire run of show from start to finish
  [ ] Test all technology end-to-end (presentation, audio, interactive tools)
  [ ] Practice transitions between activities and facilitators
  [ ] Review timing and make adjustments as needed
  [ ] Confirm roles and responsibilities for each team member
  [ ] Practice contingency plans for common scenarios
  [ ] Address any questions or concerns from team members

[ ] **Finalize logistics**
  [ ] Registration list downloaded and printed
  [ ] Name tags prepared
  [ ] Participant packets assembled

- [ ] Room setup confirmed
- [ ] Catering arranged (if applicable)

Day-Before Checklist

- [ ] **Materials and equipment ready**
    - [ ] All printed materials packed
    - [ ] Technology charged and tested
    - [ ] Backup materials prepared
    - [ ] Contact lists accessible

- [ ] **Team coordination**
    - [ ] Final team briefing completed
    - [ ] Day-of schedule confirmed
    - [ ] Emergency contacts shared
    - [ ] Arrival times confirmed

Phase 9: Post-Training Follow-up

Immediate Follow-up (Within 24-48 Hours)

- [ ] **Data collection completed**
    - [ ] Evaluation forms collected and secure
    - [ ] Attendance records finalized
    - [ ] Any incomplete evaluations followed up
- [ ] **Participant communication**
    - [ ] Thank you email sent
    - [ ] Training materials shared (if not provided during session)
    - [ ] Additional resources provided
    - [ ] Contact information for ongoing questions

Analysis and Improvement (Within 2 Weeks)

- [ ] **Evaluate training effectiveness**
    - [ ] Quantitative data analyzed (ratings, scores)
    - [ ] Qualitative feedback reviewed and categorized
    - [ ] Team debrief session conducted
    - [ ] Lessons learned documented

- [ ] **Plan improvements**
    - [ ] Specific improvement actions identified
    - [ ] Materials updated based on feedback
    - [ ] Process changes documented
    - [ ] Future training dates considered

Long-term Follow-up (30-90 Days)

- [ ] **Assess implementation and impact**
    - [ ] Follow-up survey distributed

[ ] Behavior change indicators tracked
[ ] Additional support needs identified
[ ] Success stories collected

[ ] **Continuous improvement**
[ ] Training program updated based on long-term outcomes
[ ] Best practices documented and shared
[ ] Future training needs identified