BLUEPRINT FOR ORGANISING, IMPLEMENTING AND DOCUMENTING
A TRAINING SESSION, A SUMMER SCHOOL OR A SITE VISIT

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Intelligent Energy Europe

www.iee-promotion.eu
Why conduct a training event?

It should perhaps go without saying that a training event should not be held unless a genuine need for the training has been identified, and at least a minimum audience is likely to attend it. Another question that should be asked at the outset is: Is the event envisioned, giving consideration to the resources and budget available, likely to provide the needed training? The following “blueprint” is presented on the assumption that these issues have been carefully addressed and answered in the affirmative. And please note that the steps cannot be taken serially, one after the other, and not necessarily in the order given here. Instead, many of the steps are interdependent and must be taken together, or in an overlapping sequence.

Organising the event

The decision to hold a training event having been made, we’re ready to begin the planning phase – a phase that will extend right up until the event itself is underway. The process includes the following steps:

Determine the subject of the training, carefully and narrowly defined in scope, and state the overall goal(s) of the event. The training should be limited to what will fulfil those goals, and avoid “casting too wide a net.” Doing this at the outset, in writing, will make it easier to proceed with the subsequent steps in the process and make it considerably more likely that a successful event can be conducted.

Plan the event within the budgetary confines. This may be more difficult than it sounds, particularly until decisions on some of the subsequent steps, such as the event site, duration, and registration fee (if any, but be sure that any fee is not going to be a barrier to participation), have been made, as well as the number of trainees who eventually decide to attend. Completing the project within budget will require constant attention to myriad factors in flux.

Decide what form the training event should take – lecture, seminar, workshop (one-day? two-day? three-day?), hands-on training, field trips, etc. A field trip can be a powerful tool for any seminar, in that it offers a way to get the participants out of the workshop venue and into a setting to apply the knowledge gained in the workshop in a real-world setting. However, it is important to consider the practicalities: e.g. proximity to training venue, traffic considerations at the time of day envisioned. It is critical to have a prior visit to the site. Be sure the site is accessible to the vehicle to be used. In this setting, the trainer will be under pressure to produce concrete results. It is important for the trainer to explain any safety considerations. If the training event is to continue on the following day, consider breaking the trainees into small groups that will go through the site separately, and then make presentations on their observations to the full audience on the next morning.
1. Identify the target group of potential trainees. Draw up a list of those to receive invitations. It can be useful to consider, among other things, the minimum and maximum numbers of trainees desired, the gender mix of the trainee group and to try to select trainees with similar levels of experience.

2. Decide how long the training should take (e.g., half-day, one day, more). Consider carefully how much time the targeted trainees are likely to have for training – sessions lasting more than one day are sometimes difficult to sell due to the time invested, especially for working people. Also consider the effect that linking the training to a larger event can have on your own time and effort for advertising and promoting the event.

3. Decide on the date(s) of the event, allowing ample time for preparation and perhaps linking it to another event involving potential participants. Check to see if there are any other major EC events at national, regional or local level concerning the desired target group of trainees and consequently avoid any overlapping. Ideally, the event will be held at a time when no other training or similar events for the targeted trainees are being offered. Organise an event whose content corresponds to that of other current relevant events.

4. Determine the best way(s) to reach and engage the target group, using a personal approach when possible and linking with networks of individuals working in the interest area -- use the power of word of mouth advertising whenever possible! -- and also consider placing articles promoting the training event in publications and on Web sites read by the target group.

5. Identify and contact person(s) who will deliver the training. One of the first jobs of the trainer will be to perform needs assessment of the trainees. The trainer should be experienced in, or familiar with, the “participatory” approach, as research shows that adults learn better by doing than listening.

6. Structure the training event. Look carefully at the overall structure as well as the individual sessions. Tips:
   i. Look at the times of sessions and breaks
   ii. Look at time dedicated to each session, allowing ample time for questions and answers
   iii. Try to allow for unexpected delays (allow 10% extra time per session)
   iv. Schedule time to welcome participants and for them to become acquainted
   v. Give information on meal times, venue facilities, any extra expenses (e.g. pool, cocktails)
   vi. State ground rules (use of mobile phones, punctuality, etc.)
   vii. If possible allow flexibility for participants to pursue interests/points brought up in the training sessions
   viii. Always ask trainees at the beginning for their expectations of the training and
   ix. Then check at the end if the expectations were satisfied (evaluation form).

7. Choose speakers with the required experience. Generally, it is best not to schedule more than 20 minutes of theoretical discussion without a break;
otherwise concentration flags. Speakers should be aware of other speakers’ material to avoid duplication. Give guidance to speakers, as deemed necessary, such as:

i. Too much detail presented in a short time will hinder success
ii. Prepare copies of presentations for participants
iii. Limit presentation to five topics; repeat main points, as repetition helps learning process
iv. Save the most important topic for last
v. Allow time for questions and answers

8. Decide on location (city and/or venue) of event, again linking with another event if possible and even consider joint sponsorship of the event. Book a place for the event and check if it is appropriate. Make sure the site is convenient to the target group. Transport to and from the site should be available; otherwise provide it. By linking with another event, it may also be possible to combine the training with a large conference. If not a full day workshop, at least a half-day workshop should be possible to integrate into the event’s programme.

9. Look into whether some well-known, newsworthy personality might be invited to give a speech or otherwise participate. Ask the mayor to welcome participants on the first morning.

10. Develop a list of tasks, identify who will be responsible for completing each and rate each task in terms of priority. Sample checklists based on the lead in time to the beginning of the training event are set out below:

a. Eight weeks (minimum) before event
   i. Prepare and send invitations to the target group, including a preliminary agenda and logistical information (how to get there, where to stay, etc.).
   ii. Invite any special or expert speakers.

b. Eight weeks before event
   i. Contact speakers
   ii. Send any items requiring translation
   iii. Book venue

c. Four weeks before event
   i. Hotel reservations for trainer(s), speaker(s), out-of-town participants
   ii. Contact transport company for site visit (do they have third-party liability insurance?)
   iii. Finalise design and authorise printing of materials

d. Two weeks before event
   i. Confirm venue bookings and guest rooms
   ii. Confirm vehicle/driver bookings
   iii. Confirm speakers and send them agenda and venue location
   iv. Contact participants and send them agenda and venue location (including information on how to get there and to the hotels)
   v. Ask participants to bring materials of possible use or interest to others
   vi. Trainer to visit site of field trip
   vii. Make copies of handouts and prepare trainees’ packs

e. One week before the event
   i. Make sure seating is comfortable and flexible (capable of being moved into a circle, for example)
ii. Make sure that any materials needed (beamer, flip charts, pens, etc.) are available for the training

iii. Check on parking issues

iv. Check out the location for the refreshments (tea, coffee, lunch, ...)

f. Night before event:
   i. Walk about with trainees
   ii. Make sure seating set-up is indeed comfortable and flexible (capable of being moved into a circle, for example)
   iii. Put up any banners or signs
   iv. Check that flip charts are in place with plenty of flip chart paper and marking pens of various colours
   v. Check projectors, computers etc. It is much better to deal with technical issues now rather than wait until the morning of the event

g. Day of event
   i. Arrive at least one hour before start
   ii. Do final technical check
   iii. Check registration table outside entrance
   iv. Check trainees’ packs, including pens and notebooks
   v. Dress smartly

11. Define areas of responsibility for tasks – who is responsible for what? – and draw up a timeline for completing key tasks listed in the checklists above.

12. Determine collateral resources that will be needed – printed materials, artwork, handouts, screen, slide projector, sound equipment, interpreters, photographer, etc. All handouts should be easy to understand. Order large quantities of flip-chart paper and marker pens of various colours,

13. Contact potential venues (e.g. hotel) and discuss needs/budget; negotiate!

14. Invite appropriate news media to cover event, including pre-event coverage.

15. If appropriate, prepare and issue press releases before and after the event, if possible highlighting “hot” issues, such as climate change. Is anything newsworthy going to happen at the event? If so, be sure the media are informed.

16. Make arrangements in advance to publish results of the event, including speeches delivered, in paper form and on the project Web site.

17. Plan effective evaluation of the event, including questionnaires for participants (on both individual sessions and the overall event) inviting feedback on positive and negative aspects.
Implementing the training event

If the planning/organising process has been performed well and rigorously, and an effective trainer(s) has been selected, the training event will probably proceed smoothly. But have technical help at hand in the event of problems. The event is now in the hands of the trainer.

Tips for trainers:

i. Two-way communication is best: listen *actively* to whoever is speaking to show you understand (or ask questions if you don’t)

ii. Pick up on the emotion as well as the words said

iii. Respect opinions you may not agree with

iv. Respond politely to *all* questions

v. Ask open-ended questions to encourage participation; ask probing questions, ask clarifying questions

vi. Introduce yourself and ask each trainee to do the same

vii. Consider using “ice breakers” at the outset of the event before moving on to the agenda proper

viii. Give each trainee a card and ask each to write what expectations he/she has for the training event; the trainer will collect these cards

ix. Keep to the timing of the event programme as closely as possible

Closing event: If done well, the closing session is an opportunity for the trainees to draw a boundary between the training and a resumption of their jobs. The trainer will now read aloud the cards filled out at the workshop’s opening stating trainees’ expectations. The trainer will ask trainees whether they have been met. (If group is small, have them stand in a circle holding hands.) This is a good time for a group picture to be taken.

Finally, allow 20 minutes for participants to complete the evaluation forms for the overall training.
Documenting the event

After your event, be sure to do two things:

1. Perform a "post-mortem" evaluation where you and your group (whoever was involved in arranging and putting on the event) sit down after the event and decide what went well, what did not go well, and what things should be kept or changed. Write this own down in a short report.

2. Keep all the documentation from the event. This might include:
   - Copies of receipts from vendors
   - Dates, times, locations of event
   - Timelines that you used for planning
   - Names of speakers, contact information, ideas for other speakers
   - Copies of invitations, flyers, advertisements, etc. for the event
   - List of participants
   - A copy of your Post-mortem report
   - Anything else that you think is important for the next times that (or a similar) event is held – e.g. was there too much or not enough food/beverages, parking issues, schedule too long/short, etc...

Keep all this documentation in a file folder where it will be easy and logical for the next group of people. You might also want to keep electronic files on a shared drive. If you do this, you can be sure that you’ve helped the next organisers and repaid the previous group for doing it for you!

The event should be written up for appropriate newsletters, with photographs, and sent electronically to appropriate e-mail lists maintained by the organiser. Funder(s) and sponsors should receive the same material. The training material itself can be posted on the organiser’s Web site. Individual presentations should be examined to see if they are appropriate as stand-alone articles for professional publications or other media. Mention sponsors/supporters in all materials with the logo, and also use the PRO.MOTION templates (DOC, PPT) including the IEE banner in all materials.

It is also important to analyse the evaluation forms completed by the participants. At the end of each session, evaluation forms should be completed. At the end of the event, there should be another one for overall evaluation. Feedback should be sincerely invited and not treated as a pro forma matter. The forms should be analysed after the training has ended. Most importantly, it must be determined if participants’ learning expectations were met and if their technical knowledge was increased. Remember that comments are usually well-intentioned, but some may be off-target. Read the forms carefully and look for themes. Concentrate on what the majority state, but also consider minority comments, even though they sometimes say more about the participant than about the event. Make a list of “lessons learned.” Save it for the next training event as well as the PRO.MOTION evaluation and reporting. Make sure that the evaluation answers all points of the performance indicators.

The evaluation forms on the training sessions should not ask for identity but ask for positions of the person completing the form. Leave plenty of room for participants to respond fully. Ask:

- What part of the training was most and least useful?
- Describe any overall benefit you gained.
• How will the training help you in your future work?
• What did you think of the other participants? Were they responsive and interactive?
• Which participant contributed the most?
• What is your opinion of the materials in your pack? How could they be improved?
• What is your opinion of the (lead) trainer? Other trainers?
• How could the seminar have been better?
• What follow-up do you want to see from us?
• Do you have any comments on the logistics of the event?
• Do you have any other comments?
• Do you have any ideas/wishes for next/future training events?

In addition to asking the trainees to complete an evaluation questionnaire on the training sessions and the overall event, it might also be possible to ask them to complete a survey on their use of the knowledge gained from the training in their everyday work. This survey should be sent out to the trainees about 6 months after the training session/event itself.

Sample questionnaire forms are included below for adaptation to suit your own requirements.
Sample Training Evaluation Questionnaire

Course: 
Session: 
Location: 
Date: 

Tick the boxes that correspond to your own opinion.

Evaluation scales:
- Excellent (5)
- Very good (4)
- Good (3)
- Reasonable (2)
- Bad (1)

The following questionnaire will help us to evaluate and improve the Pro.Motion Training sessions.
With this evaluation we kindly ask you to note down your impression of the training session.

The following aspects of the Training Session will be evaluated:
- Overall impression
- Insert name of topic covered
- Insert name of topic covered
- Insert name of topic covered
- Study visit
**Insert name of topic covered**

**Topic Interest**

*How interesting was the topic?*

<table>
<thead>
<tr>
<th>Excellent</th>
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**Innovation within the topic**

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**Usability of the content of the session/unit**

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**Duration of the session/unit (according to the level of interest and relevance)**

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**Balance between theoretical and practical parts of the session/unit**

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**Examples worked on during this session/unit**

*Regarding the practical examples you worked on, how did you find them?*

**Helped to consolidate the new knowledge gained**

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**Helped to build on it for my further work**

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**Helped to get new ideas for future fields of activity**

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Trainer performance:
Please rate the overall performance of the trainer: 

Insert name

Technical knowledge
Excellent  □ □ □ □ □ □  Bad

Teaching abilities
Excellent  □ □ □ □ □ □  Bad

Group motivational abilities
Excellent  □ □ □ □ □ □  Bad

Originality
Excellent  □ □ □ □ □ □  Bad

Use of audio visual equipment
Excellent  □ □ □ □ □ □  Bad

Please rate the overall performance of the trainer: 

Insert name

Technical knowledge
Excellent  □ □ □ □ □ □  Bad

Teaching abilities
Excellent  □ □ □ □ □ □  Bad

Group motivational abilities
Excellent  □ □ □ □ □ □  Bad

Originality
Excellent  □ □ □ □ □ □  Bad

Use of audio visual equipment
Excellent  □ □ □ □ □ □  Bad
Training Evaluation Questionnaire

Group performance (participation level)

Excellent □ □ □ □ □ □ Bad

Overall opinion of the Session/unit

Excellent □ □ □ □ □ □ Bad

General Comments

What did you like the most?

What did you dislike the most?

Where can you see possibilities for improvements?

What suggestions do you have for future training courses/programmes?

Further Comments:
SAMPLE SURVEY TO EVALUATE USE OF KNOWLEDGE GAINED BY TRAINEES

The purpose of this brief survey is to find out whether you have used any of the knowledge gained from the training sessions in your daily work. Obviously not all of the topics covered might come within your everyday responsibilities and duties. However, it is very important for us to understand the impact that our training sessions have had on your ability to do your job. We would therefore appreciate your taking some time to answer the following questions.

1. Please confirm which training session(s) you have attended by ticking (✓) the relevant box(es) below:

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<tr>
<th>Session [Insert location and date]</th>
<th>Attended (please ✓)</th>
<th>Session [Insert location and date]</th>
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2. Please indicate which topic(s) are directly relevant to your current job by ticking (✓) the relevant box(es) below:

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<th>Topics</th>
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3. Please explain briefly how you have used the knowledge gained under each of the relevant topic(s) below, making reference to the specific aspects of the topic(s) covered during the training sessions.

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<th>Topics</th>
<th>✓</th>
<th>Comments</th>
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   | [insert topic name]               |         | I have been involved directly in the planning/implementation/modification of [insert topic name] in my region/city or company
   |         |         | Please ✓ the relevant box: New □ Modified existing □
   |         |         | Did you use, or benefit from, the training session?
   |         |         | Please ✓ the relevant box: Use □ Benefit □
   |         |         | Further comments:
4. Please write below any further general comments regarding the use of the knowledge gained from the training sessions:

Thank you for your participation in this survey.

Please return completed forms to [insert name and contact details].