Trainer Toolkit Template

How to use the toolkit:
The trainer toolkit is intended to serve as a guideline for the types of information to distribute to the trainers and delivery team. The trainer toolkit explains the roles and expectations of the training teams, processes for communicating with the rest of the training team, and additional guidelines/suggestions.

The toolkit should be customized to fit the unique needs of each training course. Each page requires additional detail and contact information. All pages should be adjusted or removed as necessary.

It is recommended to attach *Training Satisfaction Surveys*, *Trainer Reports*, and the completed *Training Sites and Training Schedule Template* to the toolkit so all information is located in one place.

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Toolkit Overview

Overview

The trainer toolkit explains the roles and expectations of the training teams, processes for communicating with the rest of the training team, and additional guidelines/suggestions for the trainers.

Review all sections of the training packet to ensure full understanding of the trainer's role and the roles of the team throughout delivery of the training course.

Follow the processes closely to ensure that improvements to the training course delivery can be made, unanswered training issues can be recorded, and analysis of the course can be performed. The analysis is shared with various groups; therefore, the timely and accurate submission of evaluations, reports, receipts, and outstanding questions is a must.

This toolkit should be considered a living document. Updates and edits should be distributed as needed.

Expectations, Roles, and Responsibilities

Overview

It is important to understand expectations involved in the training of X. It is equally important to fully understand what each trainer is responsible and accountable for. Should questions or concerns arise, contact the training lead, X.

Expectations

- Represent the Department in a professional manner
- Escalate issues to the training lead
- Be on time and prepared
- Be flexible

Roles and responsibilities

- Prepare/check room setup and laptops
- Distribute training materials as needed
- Conduct training session – never deviate from set training curriculum and schedule
- Offer to work with participants after class to ensure a thorough understanding of the materials – Instructors (not participants) should be the last to leave
- Thoroughly document participant attendance on registration sheet. Send to X
- Answer Ask-It Basket questions and document participant suggestions from each session
- Distribute and collect evaluations. Send evaluations to X
- Submit trainer report after each session to X
- Participate in weekly training team call
- Escalate any issues to the training team lead
- Read all emails

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Travel & Expense Policy

Procedure

Refer to the ED travel regulations when creating a procedure for each training course:

http://sfa.ed.gov/employee_services/travel/fy2002_travel.html
non-FSA employees: http://www.gsa.gov/travelpolicy

All Delivery Team members are responsible to make his or her own air, rental car and hotel arrangements through X.

- Travel center phone number (XXX)XXX-XXXX
- Hotel and rental car should be charged to the trainer's credit card and expensed
- A per diem will be provided to cover items such as meals, personal phone use, laundry, dry cleaning, etc.
- Receipts must be provided for all expenses not covered by per diem (such as hotel and car rentals)
- Receipts should be mailed to X each week

Contacts

Overview

Should questions or concerns arise, contact any a member of the delivery team. If the question cannot be answered immediately, the team members will direct you to the appropriate resources.

Training Development Team

TBD	Training Lead	XXX-XXX-XXXX	Tlead@ed.gov
TBD	Development Team	XXX-XXX-XXXX	TBD@ed.gov
TBD	Development Team	XXX-XXX-XXXX	TBD@ed.gov
TBD	Development Team	XXX-XXX-XXXX	TBD@ed.gov
TBD	Operating Partner	XXX-XXX-XXXX	TBD@ed.gov
TBD	COR	XXX-XXX-XXXX	TBD@ed.gov

Scheduling and Logistics

TBD	Sched/Log	XXX-XXX-XXXX	TBD@ed.gov
TBD	Sched/ Log	XXX-XXX-XXXX	TBD@ed.gov

Metrics (Evaluations)

TBD	Metrics Specialist	XXX-XXX-XXXX	TBD@ed.gov

Communications and Sponsorship

TBD	Comm Lead	XXX-XXX-XXXX	TBD@ed.gov

Trainers

Trainer	Region	XXX-XXX-XXXX	TBD@ed.gov
Trainer	Region	XXX-XXX-XXXX	TBD@ed.gov
Trainer	Region	XXX-XXX-XXXX	TBD@ed.gov
Trainer	Region	XXX-XXX-XXXX	TBD@ed.gov
Trainer	Region	XXX-XXX-XXXX	TBD@ed.gov

How to Handle the Registration/Attendance Sheets

Overview

The following procedure will assist you in understanding how training rosters are to be completed and submitted to the logistics team. (There will be a different roster for each training audience.)

Procedure

Process Step	Who	When	What
1	Sched & Log	**Week Before Training Session**	• Create training session attendance sheet from LMS.
2	TBD	**Week Before Training Session**	• E-mail/fax training session roster to trainers. • If roster is not provided/inaccessible, please use a blank piece of paper to gather the information.
3	Trainer	**Day Before Training Session**	• Print training session roster.
4	Trainer	**First Day of Training**	• Confirm training session information (if it is not already provided in the roster): 1. Session 2. Location 3. Date 4. Trainers 5. Attendees
5	Trainer	**Everyday of Training**	• Take attendance. (Must have this data to populate into the LMS for participants to receive credit on their transcripts.)
6	Trainer	**After Training**	• Forward attendance sheets to FSAU logistics to enter into the LMS. • Send in Fed Ex envelope distributed at TOT along with evaluations and Trainer Report.

How to Handle Evaluations

Overview

All participants, following the completion of training, must fill out the corresponding training class evaluation. The following process details how the training class evaluations are to be handled and processed by the trainers.

Procedure

Process Step	Who	When	What
1	Trainer	**Last day of each training session**	• Enter the number of completed training evaluations on the training class roster.
3	Trainers	**Last day of each training session.** *Note: Send each training session's evaluations individually and on the last training day. Do NOT wait until all training sessions for the week have been completed.*	• Make a copy of all completed training evaluations. Keep these copies for 1 week to ensure their delivery. • Place completed training evaluations in the pre-addressed envelopes received during the Training of Trainers course, along with Attendance/ Registration sheets and Trainer Report. • If a preaddressed FedEx Envelope is unavailable: 1. Ship to: ***X*** 2. Shipping Preference: ***FedEx Priority*** ***(Arrives 10:30am next business day)*** 3. Bill to: ***X*** 4. Email Fed Ex Tracking Number to: X

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How to Handle Trainer Reports

Overview

The instructor completes a Trainer Report after each training session. It documents number of attendees, number of evaluations collected, and site feedback. It is also a forum for the trainer to reflect on the suggestions and evaluations received and/or special circumstances that occurred during the training event.

Procedure

Process Step	Who	When	What
1	Trainer	**After session**	• Document: 1. Number of attendees 2. Number of evaluations collected 3. Site/contact feedback • Document any issues that occurred during training
2	Trainer	**After session**	• Forward to X • Send in Fed Ex envelope distributed at TOT along with Attendance/Registration sheets and evaluations.

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Setting Up and Closing Down Checklist

Overview

To ensure an effective training experience, complete all items on the checklist. (Some parts in the "getting ready" section do not need to be repeated.)

Getting Ready

1. Confirm training location and date(s) ❑
2. Ensure the materials and equipment needed are available at the site ❑
3. Be thoroughly familiar with the trainer materials and organize them for easy reference ❑
4. Communicate with any co-trainers prior to training event ❑
5. Put together a "trainer kit" to have on hand at each training event. Suggestions include: ❑
    - Pens or pencils
    - Pencil sharpener
    - Tape
    - Stapler/remover
    - Hole punch
    - Scissors
    - Post-it notes
    - Blank diskettes
    - Travel clock
    - Band aids

Preparing the Training Room

6. Arrive at least X minutes early on the day of the training class ❑
7. Locate site contact if one has been identified ❑
8. Place course materials on tables ❑
    - Workbooks and other participant materials
    - Paper
    - Writing instruments
9. Set up all equipment ❑
    - Computers/LCD projectors
    - Easels
    - Flipcharts
10. Organize the room (adjust shades, curtains, and lighting) ❑
11. Arrange training enhancers/giveaways ❑

Closing Down

12. Collect evaluations ❑
13. Remain in the classroom until all participants have had their questions answered or documented ❑
14. Write trainer report ❑
15. Fed Ex to FSAU contact: ❑
    - Attendance/Registration sheet
    - Evaluations
    - Trainer Report
16. Gather extra materials and send to X if directed to do so (shipping costs can exceed the value of the materials) ❑

Hints for Good Instruction

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Overview

The following points will help to facilitate the training course effectively.

Procedure

1. **Arrive early and leave late**
   If available before and after class, there is more time for the individual needs of the participants. This time can be spent addressing a variety of issues:
   - Questions not directly related to the course content
   - Difficult situations
   - General concerns

2. **Encourage questions**
   Responding to questions NOW instead of LATER may prevent confusion - not only on the part of the questioner, but of other participants as well. Responses can serve as a review of key points and a reinforcement of learning. Finally, encourage participants' comments and integrate them into the presentation.

3. **Use the Ask-It Basket**
   Some participants may not want to disrupt the flow of the session by asking a question. Others may feel uncomfortable asking a question in front of the class. The Ask-It Basket should be in a visible location and should be checked after each break and lunch for participant questions. Questions should be answered that day if possible.

4. **Speak clearly and write legibly**
   Speak loudly enough to be heard at all locations in the classroom. This also keeps the overall energy level higher. Use phrases and letters that are big enough to be seen without straining.

5. **Be enthusiastic**
   Use comfortable gestures whenever possible to accent points of interest and keep eye contact with the participants.

6. **Use smooth transitions between topics/modules**
   Transitions provide:
   - Closure
   - A preview of upcoming material
   - Timing of upcoming topics and modules

If the Worst Occurs

Overview

Sometimes even the "best" activity doesn't always work the way it was suppose to because the group completely misses the point or the case study went differently then it was supposed to. These "failures" can actually be major learning successes for the participants, if handled well.

Procedure

If a group activity does not work out the way it was intended:

- Tell the class how it was supposed to work out and that it normally does work out that way.
- Guide the discussion, getting their ideas, and bring out the originally intended learning points from their comments.
- Even if they got all the wrong answers and missed every point, you can still, by way of discussion, ensure that they learn what they should have learned.

If a group activity is longer or shorter than planned:

- Individually ask the people who are having trouble what the difficulty is. They may simply have missed an instruction or some small fact. If it turns out that most of the group is having related problems, stop the exercise, clarify the situation and what they are supposed to do, entertain questions, and then start again.

- If this is an activity that is crucial for the rest of the topic, allow extra time and plan to abbreviate on some of the later, more detail-oriented exercises.

- If things are taking more time than they should because the class is talkative, explain that time is limited. This is not usually necessary if the established time schedule is maintained.

- If there is extra time at the end of the day, introduce new material, discuss/debrief the day, or let the participants experiment with their new learning.