Session Planning: Training Event Planning Survey

Training events are a wonderful way to introduce teachers and youth service providers to Biz Kid$. Training gives teachers the skills to use Biz Kid$ in their classrooms. Take time to plan what the event will accomplish and the resources it will take to make the training successful.

1. Partners:
   ___ Will you have partners for your training event(s)?
     ___ Credit Union(s)  ___ Public Broadcasting Station
     ___ Other organizations:_________________________________________________

2. Role of Partners: Check all that apply.
   ___ Financial sponsorship of a training event or series
   ___ Provide expertise as a guest speaker/panelist
   ___ Marketing the training to the audience (teachers, youth leaders, etc.)
   ___ Providing resource handouts or products for the training
   ___ Providing a venue for training
   ___ Other:_____________________________________________________________

3. Timing: How long will the training be? _______
   Note: A longer training will allow more opportunities for discussion and activities.
   Will you provide a single training or a series of trainings? _______________________

4. Audience: Who is the audience for the training? Check all that apply.
   ___ Classroom teachers (teaches a single class and all or most subjects)
   ___ Grade-level teachers (teaches single subject to the same grade-level)
   ___ Subject-area specialty teachers (may teach multiple grade levels to multiple classes)
     ___ Social Studies  ___ English Language Arts
     ___ Business  ___ Personal Finance
     ___ Math  ___ Family & Consumer Science
     ___ Life Skills  ___ Career & Guidance
     ___ Economics  ___ Entrepreneurship
     ___ Other: _______________________________________________________

   ___ Classroom Volunteers/Mentors/Trainers
   ___ Youth Development/ Informal Education Leaders/Staff
     ___ After-School Programs  ___ Youth Organization: 4-H, Scouts, Explorers, the Y, etc.
     ___ Other: __________________________________________
5. Goals & Outcomes: What are the goals for the training? Check all that apply.
___ Introduce Biz Kids and instructional resources to the participants
___ Provide in-depth topic training using specific episodes or segments of Biz Kids:
   Personal Finance, Economics, Career Awareness, Entrepreneurship, etc.
___ Create a network of teachers interested in Biz Kids
___ Gather a network of teachers interested in sharing best practices & techniques
___ Create community partnerships with organizations interested in financial education
___ Provide follow-up after the training to assist participants in using Biz Kids
___ Collect feedback to see how participants are implementing Biz Kids in their setting
___ Provide certification of training for professional development with school districts
   (agenda, materials and certificate of participation)
___ Other:_______________________________________________________

6. How will you measure the success of the training event?
___ Number of participants trained
___ Number of participants that report intention to use what they learned
___ Reported examples of how participants intend to use Biz Kids
___ Number of trained participants that report specifics of implementing Biz Kids
___ Evaluation of the session at the event
___ Evaluation of the session a few weeks after the event
___ Qualitative evaluation and testimonials at the end of the session
___ Qualitative evaluation and testimonials following the session by web survey,
   mailed paper survey, or phone interview
___ Number of students & youth impacted by participants using Biz Kids in the
   classroom or other educational setting
___ Other:_______________________________________________________

7. Capturing Data: How will you capture data from your audience?
___ Registration survey previous to the event
___ Online survey at the event
___ Online survey after the event
___ Paper survey at the event
___ Paper survey after the event
___ Follow-up email or phone interview
___ Other:_______________________________________________________
8. How will you use the data?
   ___To make changes to future sessions
   ___To provide needed follow-up with the audience
   ___To report to partners
   ___To make a future case for funding training and outreach
   ___Other:_______________________________________________________

9. Will you collect more information from this audience in the future?
   ___Online or mailed survey
   ___Phone interview
   ___Request for testimonials
   ___Invite participants to subscribe to an online forum, blog, or listserv
   ___Provide future training to improve skills
   ___Provide a follow-up meeting to share best practices
   ___Other:_______________________________________________________

10. How will you market your training?
    ___Send out information to your members and audiences
    ___Use e-newsletters
    ___Use online calendar announcements
    ___Use public broadcasting station guides and partner newsletters
    ___Use website highlights, blogs, and videos for promotion
    ___Ask your partners and sponsors to invite their audience and members
    ___Provide flyers at locations or mail them to the intended audience
    ___Take ads in publications that will reach the intended audience
    ___Provide on-air promotions, if it makes sense, for the type of event you are hosting
    ___Send out a press release to local media
    ___Other:_______________________________________________________

11. Follow-up Marketing: Market the results of the event to your partners, your audience, and
    the public. Include pictures from the events and evidence of success.
    ___Send out information to your members, audiences, and partners’ audiences
    ___Write articles for station guides, partner newsletters, and trade journals
    ___Use website highlights, e-newsletters, blogs, images, and videos from the event
    ___Take ads in publications that will reach the intended audience
    ___Provide on-air promotions, if it makes sense, to report on event you hosted
    ___Send out a press release to local media on the results and next steps planned.
    ___Other:_______________________________________________________
12. Event Set-up and Facility Needs:

A. What kind of space will you need to accommodate the training event?

B. Seating & Set-up for Speaker(s): Check all that apply.
___ Lecture Style: Lectern, or table with wired or wireless microphone(s)
___ Screening: Lectern with microphone for the speaker and microphones for audience Q&A
___ Speaker Panel: Table with microphones for each speaker
___ Table or computer stand for demonstration with computer
___ Will speaker run their own computer or will someone assist?

C. Media Needs for Speaker(s): Check all that apply.
___ Small room with small audience, no need for sound system
___ Larger room or audience: microphones for each speaker & microphones to use when audience members speak
___ DVD Player
___ Overhead Projector with Transparencies
___ Screen(s) or Monitors
___ Internet connection of adequate speed for video (Test ahead of time.)
___ Audio-Visual Projector and/or monitors to hook up to computer and DVD player
___ Will the presentation be videotaped? Are there adequate microphones to capture the interaction between speakers and the audience?
___ Computer for Presentation
   ___ sound enabled,
   ___ speakers attached to computer or means to attach to a sound system
   ___ needed peripherals (USB for drives)
   ___ CD-Drive
   ___ DVD-Drive
   ___ Required software (Test ahead of time.)
Computer software requirements
___ Flash
___ PDF reader (i.e. Acrobat Reader)
___ Video Players (Windows Media Player, Quicktime, etc)
___ MS Word program or viewer
___ MS PowerPoint program or viewer
___ Other: ________________________________
D. Audience Needs: Check all that apply.
___ Size of audience ________
___ Registration table
___ Name tags
___ Handouts
___ Parking
___ Special Accommodations: (translators or interpreters, food, accessibility, etc.)

E. Seating for Audience: Check all that apply.
___ Small group work: Tables with for seating small group work
___ Rows of seats focused on screen, moderator/facilitator, or panel
___ Hands-on computer access for audience (lab or laptop hook-ups/wireless)
___ Plan for taking Q&A from the audience directed at the moderator/facilitator
___ More than one room to accommodate training (lecture/demo space, computer lab, Breakout rooms)

F. Media Needs for the Audience: Check all that apply.
___ Are microphones available for audience members to ask questions?
___ Is staff available to assist in taking audience questions if the audience is large?
___ Can audience members see and hear speaker presentations from their location?
___ Is there captioning available on display, or language translation?

G. Facilities Set-up:
___ Do you have a break area?
___ Will you serve refreshments?
___ Do you have an information table to provide additional information from each partner?
___ Do you have registration and means for provision of certificates for training?

H. Agenda Planning:
___ Do you have a timed agenda with breaks and housekeeping details?
___ Have you built in some flexibility for discussion, technical snafus, etc.?
___ Do you have a time-keeper to keep the program on track?
___ Have you shared the agenda with all speaker/participants?
___ Have you communicated the goals of each presenter’s part in the agenda and how it fits with other speakers? Give time parameters and expectations to get best results.