

Living Healthy (CDSMP) Leader Training Logistics Checklist

The following checklist may be helpful for Master Trainers during the process of planning a Leader Training. Some of the duties may not apply to your planning style or your organization; feel free to use this as you see fit!

Leader training dates:

Master Trainers:

Location:

- Main meeting area (seat up to 24)
- Breakout room (up to 12) days 2 & 4 (optional)
- Meeting location contact: _____
- CONFIRM 3 weeks prior!

Registration:

- Budget: travel reimbursement, food, venue fees, master trainer fees?
- Get official approval for expenditure
- Set application deadline & notification date
- Distribute application forms

Publicity:

- Press release
- Community contacts
- Health system contacts
- Review applications – double check licensing/partner info
- Choose participants
- Take care of ADA accommodation requests
- Send confirmation letters
 - Include dates, location, map, parking, food, agenda?
- Finalize roster

Logistics:

- Send Notification of Planned Leader training form to DHS
- Arrange coffee/tea/water service & healthy snacks
- Lunch (or list of available lunch venues)
- Room setup/ seating plan
- Accessibility & ADA accommodations – pre-workshop checklist
- Master Trainers meet to break up teaching assignments
- Travel reimbursement forms

Participant Materials:

- Manuals (DHS will supply these if you give enough notice)
- Agendas (handout)
- Books
- Relaxation Tapes/CDs – long and short versions
- Page # correction sheets (if using '06 manual and 2nd edition book)
- DHS support info sheets, reporting forms and explanation of reporting

Training Materials:

- Master Trainer manuals
- Sign-in sheet
- Chart pack (pre-made flip charts)
- Easels
- Flip charts or white boards
- Markers, dry-erase markers, erasers
- Weekly session agendas (flip charts)
- Tape/CD player
- Pens
- Pads of paper
- Kleenex
- Workshop evaluations
- Name tags
- Practice teaching assignment sheets
- Practice teaching feedback forms
- Role play cards
- Master trainer hats
- Watch that marks seconds
- Copies of chart #2
- Rosters (draft to correct, then final version on last day)

Afterward

- Process DHS travel reimbursement forms (if needed)
- Review evaluations & create report (please send a copy to DHS!)
- Send participant roster to DHS and Stanford
- Debrief training, logistics, etc. and record lessons learned
- Send certificates of completion (if not passed out on last day)
- Arrange for mentorship/observation of new leaders

Created by the Oregon Department of Human Services “Living Well with Chronic Conditions”/CDSMP support team. For more information, contact living.well@state.or.us or call 971 673 0984.