

# Organising and Managing Training Events<sup>1</sup>

Successful training events depend not only on the quality of training provided but also on the planning that supports the delivery of those training events.

These guidelines were written based on the organising procedure commonly followed by Regional Training Centres (RTC) of WMO. However, all advice given here can be useful to any institution organising national or international training events that are offered in online or residence format (classroom).

## Getting the right people in the right place at the right time

In order to achieve the results expected from a training event, it is very important to get “*the right people in the right place at the right time*”, which is a well-known principle for strategic workforce planning. In this case, the expression “*the right people in the right place at the right time*” can be interpreted as having the most suitable people involved in a training event, which takes place in an appropriate location and time.

“*The right people*” is all about participants, instructors and organisers. While organisers and instructors are most commonly staff of the institution offering the training, participants may be coming from different places.

Selecting the applicants that will be accepted to participate in the training event is an important step in the organisation, and for this, writing clear selection criteria and application forms can be of great help. The application forms should have adequate questions to obtain sufficient information to help you in the selection. Awareness of the selection criteria can also be useful to prospect participants, as this can help in their decision to apply for training that is most appropriate for them. Providing the selection criteria when advertising the course is always a good practice to follow.

The number of participants is another essential piece of information. In addition to its importance in the planning of training delivery, like the decision of quantity of instructors needed to train a set number of participants for example; this information also affects the budget. This is of particular importance for classroom events, as the choice of venue, accommodation, transport, catering and other logistics will all be affected by the number of participants to be received.

“*The right people*” also includes the instructors. If there are not enough or qualified instructors available at the hosting institution, inviting external instructors (from

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<sup>1</sup> Adapted from lessons and presentations by Mustafa Adiguzel.

different institutions) should also be considered.

Finally, the organisers of the event are an important group of people to select too. This group may include course managers, administrative, and technical and logistical support staff. Distributing responsibilities and defining the roles of each member in the organising team is essential for effective planning and smooth running of the training event.

When it comes to choosing “*The right place*”, this may be the physical location for residence training or a virtual location, for an online course.

In the case of residence training, the physical facilities such as classroom, laboratories, break-out rooms, cafeteria and library play an important role in selecting the venue for the event. However, accommodation, catering and transport are also important factors to be considered. The distance between the training venue, accommodation and catering facilities for example, can affect not only the budget of the event but also the schedule, as the time to move between facilities will have to be taken into account too.

When organising online training, the major difference is that “*the place*” is virtual, so the learning environment is Web-based. Depending on the goals of the event, different formats might be considered, and this will indicate what sort of Web-technology and support will be needed. For example, if you are planning a weather briefing online, a single webinar (short for Web-based seminar) would do. In this case, you would need a Web conferencing system to offer your training. On the other hand, if you are planning a one-week long course, you may consider designing a course website to “house” all the training resources. Learning Management Systems (LMS) are ideal for this purpose, as they serve as a hub from where instructors and learners can access the training resources, communicate, and even work in collaboration to develop projects and participate in activities.

*The “right time”* is, first of all, about establishing the date of the training event. This will depend mainly on the availability of the presenters and, in the case of classroom training, the availability of the venue too. Care should be taken to ensure that the date does not conflict with major public holidays, religious celebrations and other association events.

For classroom events, weather may be another important factor to consider. Although the weather cannot be controlled, harsh seasons that are likely to be very hot, very cold or too rainy for example, would be better avoided.

The duration of training events should be defined by careful planning of the schedule. It should be long enough to allow for the completion of the course programme, but not too long as to cause loss of interest and waste of resources.

Similarly to residence training, online training events also benefit from a clear schedule and well established timeline. This helps learners to keep up the momentum and complete activities by the deadlines, instead of pushing their study time to a later date. In addition, if the training involves learners and instructors located in different time zones, synchronous group work should be avoided. Alternative activities that can be performed asynchronously can be as effective and much less stressful in this case.

Getting “*the right people in the right place at the right time*” is only possible with detailed planning and effective organisation. This includes a variety of activities to be performed before, during and after the training event. Some of these activities are described in the following sections, but please note that this is not an exhausted list.

## Activities before the training event

### Form an organising committee

The role of an organising committee is to take responsibility for putting on the training event. There needs to be an adequate number of members to ensure that the workload and responsibilities are shared. The size of the committee will depend on the size of the training event.

### Develop a work planning sheet

A work planning sheet is an important document and shows the timeline for the organization steps. It should include:

- All the activities to be undertaken
- Individuals responsible
- Deadlines for completing each activity

### Decide on dates

The date will depend on the availability of the instructors and venue (if appropriate). Care should be taken to ensure that the training dates do not conflict with major public holidays, religious celebrations and other associated events.

### Select a venue

If you are organising a residence (classroom) training event, you will have to select a venue. Below are some criteria to consider when making the selection:

- Classroom (Requirements & Equipments)
- Laboratories (PCs, Software Packages, Instruments)

- Breakout rooms
- Cafeteria, Restaurant (Breaks, Meals)
- Accommodation (Guest House, Hotel)
- Transport between Airport and Training Facility
- Transport between Accommodation and Training Facilities (if needed)
- Fitting the budgetary allocation
- Accessibility to public transport
- Disabled access
- Acceptable facilities (e.g. toilets clean, cloakrooms available)
- Security requirements
- Adequate heating/cooling
- Is equipment provided by the venue (e.g., whiteboards, flip charts, chairs, tables, sound equipment etc.) or required to be borrowed or hired?
- Will the venue cater for food and beverage requirements or will separate arrangements need to be made?

### Develop a Website for the training event

Even if it is not an online training event, having an online learning environment for the event can be of great help. Such a support Website can be used for:

- Pre-course activities (discussion forum, surveys, reading materials, etc.)
- Posting logistic information (venue, facilities, transport, accommodation, security info, etc.)
- Placing resources and proceedings
- Keeping in touch with participants and to run follow-up activities like surveys and discussions

The use of a Learning Management System (LMS like Moodle, for example) to create the course website can be of great advantage, as the system has appropriate tools to structure the course, make the training resources available and facilitate communication between organisers, instructors and learners.

If using a LMS, consideration should be given to the following aspects:

- If your institution decides to host a LMS - Skilled staff will be needed to install, set up and maintain the system
- If your institution decides to contract a LMS hosting company – Budget will need to be carefully considered

Independently of who is hosting the LMS, the organisers will need to have staff who is familiar with the capabilities of the system to design the learning environment and support the instructors. Additionally, a very good practice to follow when using online learning environments is to write a short guide to help learners to explore the course website.

## Draw up a budget

Drawing up a budget will allow the organisers to identify where the funds are expected to come from and what expenses are likely to occur. With this information the organisers will be in a good position to say how much money will be needed, how much money will be available to be spent and determine the tuition fee, if applicable.

### Expenditures may include:

- Venue hire
- Equipment hire
- Catering for meals and coffee-breaks
- Stationary (paper, pens, name badges, nameplates, pen drives, etc.)
- Promotions (printing of posters and banners, advertising, souvenirs)
- Printing of training material
- Social events (welcome reception, celebration dinner, cultural tour, etc.)
- Technical support – This may include support to design training material or website, host a learning management system (LMS), provision of IT support during the training, etc.
- Expenses for instructors (travel, allowance, accommodation, honoraria)
- Expenses for participants (travel, pocket money, accommodation)

### Incomes may come from:

- Government
- Training institution budget
- Tuition fees
- Sponsorship

## Announce the training event

The announcement of the training should include all basic information that could help prospect participants to consider applying. A general list is provided below. The application procedure and selection criteria should also be clearly described, and application forms provided as appropriate.

### Course Information should include:

- Overview of Content and objectives of training
- Expected Learning Outcomes
- Competency Frameworks to be addressed (if appropriate)
- Dates
- Location
- Language
- Audience (including pre-requisites, if any)
- Fees and financial support (if appropriate)

- Deadline for application (if appropriate)
- Contact Person (name and contact information)

### Maintain contact with instructors

Maintain contact with the instructors to ensure they are kept briefed about the programme and arrangements. Make sure that their requirements for equipment and support are identified and provided in time. Having meetings with the instructors before the training event are extremely valuable opportunities to discuss any support needed prior and during the training (e.g. organising training material in website, printing handouts). Setting up deadlines for production of training material is essential.

### Prepare “Information Pack”

Prepare and distribute information pack to participants. This could be enclosed with the acceptance letter and also be made available in the course website (is applicable). Important information to include:

- Address of the venue
- How to reach the venue
- Information about transport
- Accommodation and lodging
- Visa information
- Climate data
- Currency information
- Insurance responsibilities
- Electricity and plugs info
- Local emergency numbers

### Create the Course Programme

The *Course Programme* is essentially the schedule of the course. This could be enclosed with the acceptance letter and also be made available in the course website (is applicable). The document could include:

- Date/time of Registration, Opening and Closing Ceremonies (if applicable)
- Training slots - this is the main part of the programme
- Coffee and Lunch Breaks (if applicable)
- If appropriate, slots for technical and cultural activities

### Selection of participants

Based on the selection criteria decided, a selection board meeting should be organised with relevant people. In addition to qualifications of candidates, the selection criteria may include geographical balance, gender balance, priority of

candidates from Least Developed Countries or countries in need of that special training.

### Send acceptance/rejection notifications

The notification of acceptance/rejection should be sent to all applicants (and/or their Permanent Representatives (PRs), director or supervisors, if appropriate).

Rejection letters should explain the reason the applicant could not be accommodated in the training event on that occasion. This is a sensitive letter where the wordings should be chosen very carefully. It is important not to offend the candidates and their countries.

Acceptance letters should include:

- Reiteration of dates and place of the training event
- Confirmation of acceptance of their application
- Financial condition of acceptance (e.g. travel, accommodation, tuition fee, meals, pocket money, etc.)
- Visa support statement in case needed
- Request for confirmation of participation from selected participants

### Identify technical requirements and arrange for their availability

Determine what kind of equipment will be needed and where you will get them. It is important to liaise with the instructors to know their needs for their sessions.

The equipment may include:

- Computers
- Internet connection
- Specific software packages
- Data projector
- Screen
- Pointer
- Microphones
- Headsets and translation boots (if interpretation provided)
- Pens and paper
- Flip charts and markers
- Whiteboard/backboard

### Plan opening and closing ceremonies (if applicable)

Depending on national and international importance and participants of the training event, the type of an opening ceremony and its invitees could be different. Invitations should be made well in advance. Below are some possible invitees to be considered for an opening ceremony:

- Permanent Representative (PR) of the country with WMO

- Sponsoring organizations
- Management of the training institution
- Local authorities
- Local press
- Instructors
- Participants

### Arrange breaks and catering

It is necessary to make sure that all arrangements have been done regarding coffee breaks and lunches. If the facilities do not have catering, it would be a good idea to arrange a catering company or decide on some restaurants close to the facilities, and pre-book places for the group, well in advance. Wasting time by taking the participants to far places and/or having reservation problems may affect the training programme negatively.

### Arrange accommodation

If the training facilities also have suitable accommodation capabilities, rooms and other logistics have to be arranged before the participants' arrival. It is ideal to spare one room for each participant. However, if this is not possible, the participants should be informed at the very beginning. Their agreements have to be obtained and they should never be obliged. Considering their cultural differences, gender, and religion are important criteria.

### Arrange transport

These arrangements could include:

- Transfers between airport or bus/train station and accommodation for arrival and departure of participants
- Transfers between accommodation and the training facilities (if not the same place)
- Transfers for technical/cultural tours and excursions (if applicable)

According to the conditions and agreements, the organizers may be expected to provide transfers between airport or bus/train station and accommodation. If this is the case, the organizers are expected to make necessary arrangements according to travel details of the participants before their arrival.

If for any reason the accommodation and the training facilities are not in the same place, transportation between these two places during the training event should also be arranged before the event.



If the budget and the training programme allow slots for technical/cultural tours and excursions, these arrangements should also be done before the event starts, if possible. This should be coordinated with the instructors and not affect the training programme and cause delays.

### Write a Course Guide

The Course Guide is an important document, as it explains what sort of engagement organisers and instructors expect from participants, and also what participants should expect to gain from their full participation in the course. The guide should include:

- Orientation about the structure of the course
- Estimated time participants should expect to dedicate to studying the course (this is particularly important to online courses)
- Guidelines on how communication between instructors and participants should take place
- Information about ways to request support if needed
- Reminder of where to find the schedule of the course (including deadlines for assignments)
- Assessment guide (if applicable), including information regarding minimum requirements to obtain a certificate at the end of the training

### Prepare registration packs for participants (classroom events only)

These individual packs for participants should be prepared before the event and given to them during registration or their arrival to the facility. They can include:

- Name badges
- Detailed course programme
- List of participants
- Information on the venue
- Pens and writing pads
- Bags, if the budget allows
- Training material
- Local maps and brochures
- Emergency numbers/contacts

### Set up the venue (classroom events only)

Setting up the venue can include:

- Organising the classroom
- Arranging chairs and tables setup depending on the training needs
- Distributing training material
- Checking equipment (flipcharts, projectors, computers, internet, etc.)

- Placing interpretation boots and headsets (if applicable)
- Putting up signage (room numbers, facility directions)
- Organising the registration desk
- Getting the information packs for participants ready

### Allocate responsibilities among staff involved

It will be important to allocate responsibilities among the staff involved in organising and running the training event. They need to be thoroughly briefed on the programme, the venue and facilities and their responsibilities. They should be easily identified by participants as people they could ask for assistance. Tasks of these staff could include:

- Providing assistance on the registration, opening and closing ceremonies
- Setting up and testing equipment
- Making sure equipment is securely stored during breaks
- Liaising with caterers
- Helping in classroom (checking ventilation, room temperature, water and glasses on the tables, etc.)
- Supporting instructors before, during and after their sessions (photocopying, distributing handouts, circulating microphones, etc.)
- Providing assistance on excursions
- Helping the distribution of certificates
- Providing technical support to participants (e.g. using equipment/laboratories and also using the course website (e.g. participating in activities, checking settings of the site, ect.)
- Testing and maintaining the course website up to date

## Activities during the training event

### Arrange registration of participants

A registration desk with local staff should be ready on the day of opening, and the name badges and event packs should be handled to the participants.

In online events, this may be done some time before the course starts (about one week before is recommended). This allows time for participants to explore the website and solve any access problems prior the beginning of the course.

It is important that the organisers of the course confirm all enrolled participants are present at the venue (classroom courses) or have been able to access the course website (online course). This will indicate if there is need to contact missing participants to investigate reason of absence and also need for support.

### Conduct an opening ceremony (classroom events only)

In order to avoid any diplomatic and/or hierarchy problems, order of statements should be checked with the individuals.

### Arrange a group photo session

Photographs of the venue, presenters, participants and sessions can be used to promote the activity. Just after the opening ceremony, a photo session can be arranged to include also the high ranking officials and representatives attending the ceremony.

### Make general announcements

One person should be arranged to gather and compile information and to announce it at the beginning or at the end of each session when necessary. This information could be on facilities, where coffee breaks and lunch will be served, telephones, internet, transport, security, computers, and other specific matters.

In online courses, having a forum dedicated to announcements is always a good way to make the information easy to find at any time.

### Ensure smooth delivery of training

Ensure supporting staff is available and acting as needed to provide smooth delivery of training. Instructors/facilitators may need support during their sessions for printing, distributing handouts, circulating microphones, uploading training resources to the website, setting up of synchronous sessions, etc.

### Distribute certificates

Attendance certificates, which are already prepared and signed by the relevant people, should be handed to the participants at the end of the training event. It is important to try to have these certificates ready in advance, as there may be difficulties to reach the PRs and other authorities to sign at the last minute.

This activity may take place after the event, in case assessments and projects need to be marked.

### Conduct an event evaluation

The evaluation may be initiated at the end of the training event, with the collection and or discussion of general feedback and suggestions. In addition to the questions about course content and training delivery, organisational aspects should also be evaluated. Contacting participants to collect further feedback a couple of months after the end of the course, in order to investigate about the application of skills acquired during the training, should also be considered.

## Activities after the training event

### Send final communication to everyone involved in the training

The final communication to be sent to participants may be just a final acknowledgement from organisers or also include results of final assessment and projects. Remember to also write thank you letters to instructors, sponsors, and supporting staff for their contributions.

### Finalise financial responsibilities

Pay outstanding accounts and develop a closing balance sheet.

### Prepare a report

Prepare a report on the training event to summarise outcomes and identify lessons learned. Such report should include:

- List of participants
- An overview of activities undertaken
- Summary of evaluation results
- Financial summary (incomes, expenditures, receipts, etc.)
- Lessons learnt to support future events planning

Remember to share the report with sponsors too, if there is any.