



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 Kid\$** and instructional resources to the participants
 - ☐ Provide in-depth topic training using specific episodes or segments of **Biz Kid\$**:
Personal Finance, Economics, Career Awareness, Entrepreneurship, etc.
 - ☐ Create a network of teachers interested in **Biz Kid\$**
 - ☐ 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 Kid\$**
 - ☐ Collect feedback to see how participants are implementing **Biz Kid\$** 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 Kid\$**
 - ☐ Number of trained participants that report specifics of implementing **Biz Kid\$**
 - ☐ 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 Kid\$** 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.