



WEB-CONFERENCE TRAINING (WCT) FACILITATOR CHECKLIST

There's a lot to think about when preparing to instruct a live, virtual training. You must be comfortable delivering the material online, plan for the unexpected and do what you can to make sure you are set up from a technological perspective (e.g., have good internet connectivity, have the appropriate files ready to share online, etc.).

This form has been designed to help you prepare to deliver live, virtual trainings. This is a fillable form which can be completed directly on your computer. The tasks listed in this form consist of minimum expectations to effectively prepare. You are encouraged to perform some of the checklist items earlier than expected so that you are fully prepared. You may have your own personal checklists as well to help plan for effective delivery.

The next pages highlight the items for you to check off in preparation to instruct a web-conference training.

Four Weeks in Advance

- WORK WITH NHI STAFF TO MAKE SURE ALL FILES YOU HAVE ARE THE MOST RECENT VERSIONS

This is especially important if you have been instructing a course for a while that has gone through updates, such as changes to PowerPoint Presentations, the Facilitator Guide and/or the Participant Workbook. You should always compare documents with NHI to make sure you are working with the most recent.

- PARTICIPATE IN A DRY RUN WITH THE INSTRUCTIONAL DESIGNER AND THE HOST

You should participate in a dry run for the course close to a month in advance so that you and the host are comfortable with delivery. It is a good time to address items that could get overlooked. For example, you may want to decide who will open the course and do introductions on the first day of training.

Two Weeks in Advance

- ACCESS YOUR VIRTUAL CLASSROOM

It is important to access your virtual classroom at least two weeks in advance to ensure you have host rights to the meeting room. If you do not, contact NHI immediately.

- BECOME FAMILIAR WITH THE LAYOUT AS PRESCRIBED BY THE FACILITATOR GUIDE (FG)

You must know the layout of the classroom to effectively deliver the course.

- **READ THE FG; THEN READ IT AGAIN**

The FG is the document you will study over and over again. The FG guides you during the course. It contains detailed information on the layout of the virtual classroom and all of the content that you will need to deliver. It includes a script for the content. However, you are considered the expert. As such, you are expected to make the course content your own.

- **FAMILIARIZE YOURSELF WITH THE PARTICIPANT WORKBOOK**

The Participant Workbook serves as an instructional support tool which contains detailed information on the content delivered throughout the course, along with additional resources for participants to refer to after the course has concluded.

- **REHEARSE YOUR PRESENTATION IN THE VIRTUAL CLASSROOM**

Rehearsing your presentation in the virtual classroom environment is extremely important when it comes to effectively delivering the course. You should rehearse on your own before and after participating in a dry run with NHI.

- **PRACTICE EACH ACTIVITY INCLUDING POLL QUESTIONS, NOTE TAKING, WHITEBOARDS, ETC.**

Practicing each activity will help you become comfortable using the pods. It will also help in the event you will need to teach participants how to use the pods if they have difficulty.

One Week in Advance

- **LOGIN TO YOUR VIRTUAL CLASSROOM AND PRACTICE CONDUCTING THE LESSONS/ MODULES AS PRESCRIBED BY THE FG**

Practicing delivering the course as prescribed by the FG will help you make the course your own and sound natural upon delivery.

- **COORDINATE ANY PARTICIPANTS NEEDING SPECIAL ACCOMMODATIONS WITH NHI**

In the event there are any participants needing special accommodations (e.g., closed captioning), please coordinate with NHI.

- **IF APPLICABLE, CONTACT HOST AGENCY PROGRAM LEAD FOR SPECIFIC INFORMATION ABOUT THE AGENCY**

At times, NHI has WCT courses in which all or a majority of participants are from a specific agency. In this case, it may be beneficial to reach out to the host for any information that could help you with course discussion.

Three Days in Advance

- **CONDUCT A FINAL CHECK OF THE ROSTER OF LEARNERS; IDENTIFY LAST MINUTE REGISTRANTS**

NHI closes IVC registration at least three business days in advance of courses. Upon registration cutoff, check with NHI to make sure you have the most updated registration list.

- INTRODUCE YOURSELF VIA EMAIL AND PROVIDE THE COURSE SCHEDULE TO ALL PARTICIPANTS

It is important that you introduce yourself over email to all participants before the course to start the communication. There is a sample introductory email contained in each FG that you can use as a starting point. The email should contain some information about your background and the course schedule.

- COORDINATE RECORDING WITH NHI (IF NEEDED)

NHI's WCT courses are typically not recorded as they are meant to be highly interactive and not distributed to audiences outside of those who have gone through the registration process.

Twenty-four Hours in Advance

- ENSURE THAT ALL PODS YOU NEED TO DELIVER THE WCT COURSE HAVE BEEN SET UP IN THE ASSIGNED MEETING ROOM

Double-check to make sure all of the pods needed to conduct the course are properly setup in the classroom.

- ENSURE THAT THE SLIDES FOR ALL OF THE LESSONS ARE ACCURATE AND UPLOADED TO THE MEETING ROOM

Double-check to make sure all of the slides are in the meeting room and in the appropriate order.

- ENSURE THAT ALL ITEMS YOU WANT TO SHARE ARE EITHER UPLOADED OR READY TO SHARE FROM YOUR DESKTOP

Make sure that any items you will be sharing are readily available on your desktop so that you can easily access them during the training. This may include videos, websites, excel documents, etc.

- CLEAR EVERY POLL; ENSURE THE BROADCAST OPTION IS NOT CHECKED

If the course has been delivered in the past and the polls already completed, every poll must be cleared with the broadcast option unchecked. Usually you will have a host assigned to help clear the classroom of any old polls, chats, etc. However, you should make sure this has been taken care of in advance to make sure the room is ready for new participants.

- ERASE ALL SCREEN HIGHLIGHTS THAT MAY HAVE BEEN ADDED DURING A DRY RUN OR A PREVIOUS LESSON

Again, this is old information and it will appear as though you were not prepared. Make sure it is removed.

- TEST ALL WEB LINKS

Web links can become outdated. The last thing you want is for participants to try to access a web link only to be taken to a "404 Not Found" web page.

- MAKE SURE YOU HAVE THE CORRECT TELECONFERENCE NUMBER AND PASSCODE; POST IN A NOTES POD

All of NHI's WCT rooms have the teleconference number and participant passcode posted somewhere in the room upon participants' initial login. Although they should have this information beforehand (on their My Training page and in the introductory email), it helps to provide it again at the beginning of the course.

- MAKE SURE YOU GIVE PARTICIPANTS INSTRUCTIONS TO COMPLETE EVALUATION BY GOING BACK TO NHI'S "MY TRAINING" PAGE

The only way participants get a certificate of completion is by completing the course evaluation. It is important to provide them with instructions on how to access it. They first need to have finished all modules/lessons (with system recognition) and then complete the end-of-the-course assessment. If they believe they have completed the course but the system does not recognize this, they should contact NHI at NHICustomerService@dot.gov or 703-235-0500.

- CHECK WITH COURSE HOST FOR ANY LAST-MINUTE INSTRUCTIONS/CHANGES

There may be some last-minute instructions/changes for the course. Reach out to make sure everyone is on the same page and everything is set for the day the course starts.

Thirty Minutes in Advance

- FIND A QUIET PLACE WITH LIMITED DISTRACTIONS

To avoid interruptions, it is helpful to locate to a place where you are confident you will not be interrupted and where there will not be distracting background noises as you deliver the course.

- ADVERTISE YOU ARE IN A WEBINAR TO AVOID INTERRUPTIONS

Put a sign outside of your office door/other quiet location to avoid anyone knocking or walking in during your delivery.

Fifteen Minutes in Advance

- LOGIN TO THE MEETING ROOM USING YOUR ADOBE USER ID AND PASSWORD AND DIAL INTO THE TELECONFERENCE EARLY

This helps give you time to get organized and make sure you and your host (if applicable) are both on the line and connected.

During the Training Event

- DEMONSTRATE DESKTOP SHARING AND WHITEBOARD DRAWING IF PARTICIPANTS ARE TO USE THOSE FEATURES

If you expect participants to use these features, it is important to first demonstrate. You can do this through a screen share.

- **START ON TIME AND STAY ON TRACK**

Always start on time, even if only one participant is in the room. Keep exercises within their time limits. End discussion when they cease to be productive. Lead participants away from digression and tangents and back to the lesson.

- **REVIEW AND PROVIDE MEANINGFUL FEEDBACK TO PARTICIPANTS**

Constructive feedback is key in helping participants during training. Thank participants throughout the training for any contributions they make in participating during the course.

- **BE PREPARED TO ANSWER CONTENT-RELATED QUESTIONS FROM PARTICIPANTS**

You should be prepared to answer content-related questions from participants. If you have a host available to support you, they should be helping to filter questions coming through the chat pod and let you know which ones you should answer. If you do not know the answer, simply tell the participant that you do not know the answer off of the top of your head but you will get back with them.

Two Weeks after the Training Event

- **REQUEST A COPY OF THE COURSE EVALUATION DATA FROM NHI**

Getting a copy of the course evaluation data from NHI will help you understand what went well or did not work as well for participants and know how to make improvements in the future.

- **REVIEW DATA AND DISCUSS RESULTS WITH THE TRAINING PROGRAM MANAGER (TPM) AND/OR INSTRUCTIONAL SYSTEMS DESIGNER (ISD)**

It is helpful to discuss the course in general, the results of the evaluation data and suggestions for improvement with the TPM/ISD to help make the course better for future delivery.

- **SHARE LESSONS LEARNED WITH NHI**

You may have learned some valuable lessons during your delivery of the course that the TPM and ISD can help incorporate into future training offerings.

- **DOCUMENT ANY CONCERNS SO THE COURSE CAN BE APPROPRIATELY UPDATED**

Do not be afraid to document any concerns you may (no matter how small) have if it means that it will improve course content/delivery.

- **SEND AN EMAIL TO COURSE PARTICIPANTS TO THANK THEM FOR THEIR PARTICIPATION AND FEEDBACK**

Participants will appreciate additional communication once the course has ended. Just a simple thank you can go a long way.