STEP 2. CREATE AN ACTION PLAN OR CHECKLIST FOR DEVELOPING AND CONDUCTING THE TRAINING

Careful planning from the beginning can save you tremendous effort in the long run. A well-crafted action plan allows you to:

- Clarify your vision and goals for the training program

- Achieve consensus among the persons involved

- Establish realistic budgets and a sound structure for managing the project

- Identify strategies by which your objectives can be accomplished

- Define the many tasks involved in putting on a training program

- Assign and delineate duties and responsibilities

Checklist. A helpful way to document your action plan is in the form of a written checklist. This will prove to be an invaluable tool. Setup in the form of a chart or matrix, the checklist indicates:

- The task or activity to be accomplished

- The person responsible

- The date when the task will begin

- The due date or deadline

- The actual date of completion (if deadline is missed or if activity is completed early)

The checklist functions as a running tally of tasks completed. It allows you to record and review your progress and prevents important elements from being

overlooked. One logical way to organize the checklist is to use the steps and activities described in this Toolbox and order them to fit your needs and to meet your scheduled deadlines.

Timeline. The checklist also incorporates the project timeline, establishing a feasible schedule for producing the training. As a rule, the timeline should begin *at least* three months prior to the course. Once the date for the course is set, calculate backward from that date, or the first day of a multi-day training, to establish start dates and due dates for the pre-course activities. In planning the timeline, consider:

- Weekends, vacation schedules, holiday periods, and other possible sources of delay

- Existing schedules and commitments of your staff and faculty members

- Capabilities and requirements of printers and other vendors (consult key vendors in advance)

Calendar. Another useful planning and reference tool is a master calendar that records due dates for tasks in all categories. Essentially, the calendar is a version of the checklist organized by date rather than according to the steps or modules. By showing at a glance which tasks should be completed by a certain date, the calendar can help keep everyone on track.

Distribution. The checklist and/or calendar should be distributed before the first due date. Everyone whose name appears on the checklist as a person responsible for an activity should receive a copy.

PRE-COURSE TASKS

ACTIVITY 2-A

Select a date for the training.

ACTIVITY 2-B

Design or adapt a checklist or action plan framework to use as a planning tool. Include all of the activities and tasks to be accomplished prior to the course, on the day(s) of the training, and after the course is over.

> **Associated Tool #1: Training Program Checklist**
>
> *(Source: Francis J. Curry National TB Center, San Francisco)*
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> **Associated Tool #2: Preliminary Course Checklist**
>
> *(Source: Florida Department of Health)*
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> **Associated Tool #3: Preliminary Course Checklist**
> **   *(short version)***
>
> *(Source: Francis J. Curry National TB Center, San Francisco)*
>
> **Associated Tool #4: Co-Sponsored Course Checklist**
>
> *(Source: Francis J. Curry National TB Center, San Francisco)*

ACTIVITY 2-C

Determine who will be accountable for accomplishing each of the activities or tasks involved in putting on the training and enter the names on the checklist.

ACTIVITY 2-D

Working backward from the first day of the training, develop a timeline with start dates and due dates for each activity. Enter the dates on the checklist.

ACTIVITY 2-E

Create a master calendar, organized by date, that shows the due dates for tasks in all categories.

ACTIVITY 2-F

Distribute the checklist and calendar to everyone who is responsible for one or more of the included activities or tasks.

ACTIVITY 2-G

Update the checklist and calendar throughout the training production period to reflect completed activities and revised deadlines. Distribute the updated calendar to keep everyone apprised.