

SHINE CPD group checklist for organising training sessions (updated 9 April 2007)

The SHINE CPD group is responsible for organising training sessions in external venues. This is a checklist for those responsible for organising the sessions.

1. Choosing the course :

The CPD group maps out a programme of two or three training events for the year (April to March, including the AGM which is held in April each year). Ideas can be taken from suggestions from SHINE members or the SHINE committee, from CPD group members and from courses run by other organisations which could be made available to SHINE members.

The CPD group should liaise closely with the SHINE committee and the treasurer to ensure that any expenses incurred by training courses can be met through the budget; and also that fees charged to members can be paid into SHINE funds. SHINE courses are not usually charged, unless the costs incurred (eg. through fees charged by a speaker from a private company or travel costs) are high. Charges for events are usually run past the SHINE committee before being finalised.

In organising training events, priorities are relevance to SHINE membership, accessibility and value for money.

The group tries to identify and meet the training needs of the membership while not duplicating courses run elsewhere at similar cost in Scotland. Increasingly the group is looking at collaborating with other organisations on running sessions – this could mean running a course organised by another group and subsidising it from the SHINE budget for SHINE members.

2. Choosing speakers :

Again, suggestions can be taken from the membership or from looking at speakers at similar courses – group members can also ask around for suggestions. Speakers should be contacted in good time to ensure they are able to attend, and should be given a single named contact in the CPD group.

3. About the venue :

Some venues are known from previous training organised or attended, and others are highlighted to the group by the membership or the SHINE committee. You need to consider what facilities will be needed for the event (size of room, internet access, break-out rooms for discussions?) and ease of access for those attending. Events tend to be run in the central belt in the hope that this is easier for the majority of the membership.

- establish a contact person at the venue who can answer questions – this will usually be a member of admin staff
- what facilities are needed for the event (how many people can the room hold? Internet and/or powerpoint access? Disabled access? Break-out rooms for discussion?)

- is IT support available at the venue, in case the equipment fails?
- catering arrangements – events tend to be organised at venues which can provide catering in-house. Consider costs, and how much is really needed, eg. lunch is appreciated at all-day events, but tea and coffee at the end of an event is usually not taken.

4. Advertising and preparation :

- Identify which member of the CPD group will be the contact for those applying. This person will be responsible for:
 - * Composing a booking form (template available)
 - * Taking enquiries and bookings for the course (contact details will be included on the booking form)
 - * Collecting any payments if a charge is made for attendance, and liaising with the SHINE treasurer
- courses are advertised by the CPD group via lis-shine, on the SHINE website, and in SHINE Journal
- if all places are booked, start a waiting list and pursue those if there are cancellations
- always get back to people who book – either to confirm their place or to confirm that they are on a waiting list
- keep a note of those attending on a spreadsheet, to provide details for name badges (if necessary), attendance sheets, and certificates of attendance
- prepare evaluation sheets with details of the event, for distribution on the day

5. Approx. a week before the event :

This should be done by the person who is taking the bookings

- contact attendees about a week before the session and ask them to let you know if they are not able to attend
- provide exact details on how to get to the venue (include a map if possible). Include details about parking and public transport

If people cancel and places become available, phone the first person on the waiting list and ask if he/she is still available

If places are not all taken yet, re-advertise on lis-shine

This should be done by the person attending the course

- contact the speakers and check all is well
- email or phone the contact at the venue to confirm details
- ensure you have copies of any presentations to bring on the day, as a back-up
- prepare attendance sheets for people to sign as they arrive.

6. On the day :

- at least one member of the CPD group should attend the event and be available throughout to make sure things run as smoothly as possible

- this person should turn up early to make sure everything is ready and in place. Introduce yourself to any staff who might be involved, eg. IT people, reception staff
- test all the equipment and the internet connection

7. Afterwards :

- distribute evaluation sheets at the end of the session (template available)
- certificates of attendance are sent out after the event (template available)
- if the speakers are willing, powerpoint presentations and/or podcasts (if available) from events can be uploaded to the SHINE website – liaise with the website working group

8. Money :

If members are charged for attending the course, payment should be collected by cheque or BACS made payable to SHINE. Payment should be collected by the member of the CPD group designated to be the contact for the course, and passed on immediately to the SHINE treasurer. Most SHINE courses do not pass on a charge to the members.

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