

How to Arrange Training Events

- _____ Check with diocesan calendars to coordinate events.
- _____ Check with prospective participants to coordinate dates. Make calls or write a memo to folks listed on quarterly reports. Call Sewanee and ask for mailing labels.
- _____ Set date, location (be sure to get a written contract with housing site), and starting and ending times. Be mindful of time/the schedule. When there are first-time trainees, the trainer sometimes needs time for one-on-one interviews with them.
- _____ Decide on type(s) of training [basic/in-service or formation]. If formation, choose the formation topic from those listed on pages 38–42 of the *Manual for Coordinators*. Note that some of the formations require two trainers and a larger number of participants. Use your mentor training list to determine who is formation-ready. Many coordinators have folks pick 1st, 2nd, and 3rd formation topic choices.

FORMATION EVENT CRITERIA--To be eligible to attend a formation training, one must have attended two training events and been accredited by the trainer at the second training as ready for formation training. Formation trainees must be active mentors who have led groups within the last 12-18 months. People whose last three trainings were non-basic/in-service (formation or alternate training) must do a basic/in-service as their fourth reaccreditation training.

- _____ Call or write Sewanee to put the event(s) on the master calendar. Be prepared to provide Cindy Hargis with dates, location, event type (basic/in-service or formation), formation topic, and starting and ending times. Sewanee cannot assign your trainer until we have all this information.
- _____ Make local arrangements:
 - _____ Plan housing, with private accommodations for trainer(s).
 - _____ Arrange for food (on-site meals work best). Provide snacks and beverages for break and social times.
 - _____ Plan your budget. Remember that you must cover the trainer's expenses (Sewanee reimburses the trainer for his or her expenses, and then invoices the coordinator for that amount); Sewanee pays the trainer's honorarium.
 - _____ Set costs for participants. Be sure to charge enough to meet your expenses—meals and housing for trainers and trainees, trainer's travel (\$350 per trainer) and incidental expenses (copying, phone calls, etc).
- _____ Prepare and send publicity and registration forms and registration instructions to potential registrants.
 - _____ Contact individuals whom you know are interested—active mentors in your diocese. You may also wish to invite inactive mentors and EfM graduates. Call Sewanee and request mailing labels. Also consider contacting all clergy/parishes in your diocese to introduce EfM, mentoring, and to advertise your training session.
- _____ Ask registrants and trainers to provide you with emergency contact information—phone numbers and cell phone numbers. Cell phone number exchange between

exchange between coordinators and trainers becomes especially important on travel day to your training site. Provide the trainer with directions and contact information for the training site.

NOTE: It is wise to request a non-refundable deposit or the full training fee up front from training registrants. This helps ensure that folks show up.

_____ An important part of recruiting is discernment. Talk with prospective registrants to help them decide whether mentoring fits their life at this time. Make sure they understand the scope of EfM's requirements of time and preparation. When someone from outside your diocese wants to attend your training, check that person out with the diocesan coordinator from that person's diocese. Refer to the list of coordinators on the EfM Web page: <http://www.sewanee.edu/EFM/index.htm>.

_____ Respond to registrations using a confirmation letter like the sample on page 46 of the manual. Send a confirmation letter to trainers also. Be sure to provide parking instructions in the letter. Tell registrants what to bring with them to training: *CLSM*, *Mentor's Manual*, prayer book, comfortable clothing, alarm clock, etc. Let them know that they may be asked to plan worship services and that they should bring resources for doing that.

EMPHASIZE IN THE CONFIRMATION LETTER THAT:

_____ Training requires 18 contact hours.

_____ The event is planned to begin and end on time and that full attendance is mandatory.

_____ Accreditation of mentors at a basic/in-service training is not automatic; the trainer will evaluate each trainee's readiness to lead a seminar group.

_____ Accept the proper number of registrants for each event. [For basic/in-service, six is the minimum and eight is the maximum. For formation, the numbers allowed vary depending on the topic [i.e., Four-Source Theological Reflection = 6–14 participants with one trainer; Living with Conflict = 10–14 participants with two trainers]. You cannot exceed the maximum number of participants for an event unless you obtain permission from the trainer. You cannot proceed with an event with less than the required minimum number of trainees without permission from Sewanee. This is outlined for you on pages 38–42 of the coordinator's manual.

_____ If numbers warrant adding an additional training event, call Sewanee right away to schedule the event and request another trainer.

_____ If you need to cancel an event due to a lack of registrants, call Cindy Hargis immediately. She must report a cancellation to the contracted trainer exactly 15 days prior to the start date of the scheduled event. If Sewanee fails to meet that deadline, the Programs Center has to pay the trainer one-half the honorarium (\$375) anyway.

_____ Communicate with trainer(s):

_____ Ask the trainer(s) about transportation, housing, scheduling, any special medical dietary or other needs, and what extra supplies might be needed.

_____ Send the trainer information about the trainees (i.e., their names, where they are from, number of times they have attended training, and training

status. Give the trainer a heads up when someone you are concerned about signs up for training.

- _____ Arrange to have the trainer(s) met at the airport, if necessary.
- _____ If the trainer does not drive in, arrange for a meal for him or her before the training starts. Put trainers in motels near good restaurants.

NOTE: Provide a private room for the trainer so that he or she can focus exclusively on training. Trainers are not responsible for administrative conference details, collecting registration fees, or for arranging for housing or meals. These responsibilities belong to the coordinator or the coordinator's delegate.

- _____ Three weeks before the training tell Sewanee the number and training status of participants you expect so that training materials can be sent to you. Provide Cindy Hargis with your preferred shipping address. For basic/in-service events, Cindy will need to know how many new/first-time trainees you have (those who do not have the *Common Lessons and Supporting Materials [CLSM]* notebook, *Manual for Mentors*, and start-up kit) and how many active mentors you have. 2000+ editions of the *CLSM* and *Manual for Mentors* are still serviceable. Older editions should be replaced.
- _____ Obtain an easel, newsprint, markers, tape, Bibles, prayer books, CD player, and any other supplies requested by the trainer. Several trainers like to incorporate art into training exercises. They may ask you for clay, finger paint, string, crayons, etc. Bring to training Years 1-4 texts so that newcomers can see text content.
- _____ Prepare a list of participants with names, addresses, phone numbers, and E-mail addresses, including the trainer, to place in each participant's and trainer's packet.
- _____ Greet and register participants.
- _____ Make sure that hospitality and professional assistance is provided!
- _____ Pay bills, including the invoice from Sewanee for trainer expenses.
- _____ Fill out and send to Sewanee the coordinator's report and the honorarium requisition form. Send these forms in together. [NOTE: Honorarium requisitions must be signed by the diocesan coordinator of record, not his or her delegate.] Notice the "prospective dates for your next training" section of the coordinator report of training form. Cindy Hargis looks for and will begin work on your next event(s) if you will/can provide this information on the form. If you misplace these forms or those that go to the trainer and trainees, they are available on the Web site.

COORDINATOR: If you must be absent during a training event, choose a delegate to perform these duties. Make sure to "train" your delegate. Provide him or her with whatever information, materials, and supplies needed to administer the training event effectively. Ask the delegate to read the "Mentor Training" section of the *Manual for Coordinators* and provide this checklist. Explain the tasks and your expectations.