📅 Create Training Event

Please watch our instruction video which can be found <u>here</u>.

The following considerations are offered for creating and managing courses:

Create Courses

The following individuals can create a course:

- The National Training Chair, National Training Coordinator, and National Program Manager
- Regional Team Leader and Regional Training Committee Chair
- Any Course Director, which is a role a graduate of a Train the Trainer course receives

Update Courses

The following individuals can manage or modify an existing course:

- The National Training Chair, National Training Coordinator, and National Program Manager
- Regional Team Leader and Regional Training Committee Chair for courses available to members within their region or sponsored by their region
- Area Training Chairman, Area Training Members and Point Men for events available exclusively in their areas, or
- The Course Director, Assistant Course Director, or a staff member of the event

Create Course

The following considerations apply to creating a course:

- **Active** All active training events will be displayed on the appropriate members' calendars and feeds. A training event should be set to active when it ready to receive RSVPs. Even with limited details (date and approximate time), the course can be activated and serve as a "Save the Date." Additional details can be refined over time. However, if you're not yet ready to accept RSVPs because significant details have yet to be resolved, it is best to leave the event in an inactive status. The event will appear on the creators' page with a note that it is inactive as a reminder.
- **Course Type** Select the type of course. <u>After the course is created, this cannot be changed</u>. If the type of course needs to be changed, the correct action is to delete the course and replace it.
- **Sponsoring Region** Select the sponsoring region. <u>After the course is created, this cannot be changed</u>. If the sponsoring region needs to be changed, the correct action is to delete the course and replace it. ∧
- **Description** Provide event details. A best practice is to put all the current information about the course in this form. This way, there is one place for course participants to look for the information. Emails, text messages, and other means of communication should be used to notify participants that some information has changed, provide a preview of that information, and direct your users back to the event description. If you rely on emails to

provide all the information, invariably, someone preparing to participate in the event will refer to the wrong email, and they'll have incorrect information--instead provide enough information in the emails to update your participants, but make it necessary for them to refer to the event description to get all the event details.

- **Event Date & Time** Choose the appropriate date and time.
- A note about course names: the course identifier is fixed after the event is created on the basis of the course type, sponsoring region, and the start date of the course. If the course is subsequently moved to a different year, the course identifier will remain the same, which means the year reference in the course identifier will not match the date of the course. Sometimes, when the course needs to be moved, it is appropriate to retain the old course identifier, especially when the participants have all RSVP'd and most are expected to participate on the new date. In other situations, the most appropriate course action is to cancel the event and recreate it. If you have a course event that needs to be moved from one year to the other, discuss your options with your regional team.
- View options:
  - **Specific regions** Select the region that should have access to this event. Typically, this will be the sponsoring region. Resist the urge to select all regions for your virtual Peak One event. While you might imagine that it would be convenient to do so, you can imagine how little utility the calendar feed will have if everyone who was conducting a course chose to syndicate it to every member of Trail Life. Also, recognize that each region and area team may have ministry objectives and are attempting to encourage in-person training opportunities, which you would undercut. Occasionally, it may be appropriate to select more than region if you want to include a nearby area that is just outside of the national region demarcations.
  - **Specific areas** Select the areas to whom this event should be visible. Apply a similar consideration as above, as well as the recommended practices below per course type.
  - **Specific troops** Select the troops to whom this event should be visible. Apply a similar consideration as above, as well as the recommended practices below per course type.
  - **Specific role** Select the roles to whom this event should be visible. Consider the recommended practices below per course type.
  - **Specific members** If you need to add additional members, either members that are outside of the categories above or members that are within those categories but have not yet RSVP'd, you can select them specifically by name. This tool is helpful if you have individuals arrive at your event who did not RSVP or if someone hears about your course and wants to participate, but they are not within the region/area/troop you selected above. Having added these individuals, you will also be able to assign them course roles after the course is created.
  - Course specific considerations:
    - *Peak One* This will typically be in your region, area, and then be made available to one or more troops. Also, *Peak One* events are typically available to adults, both Registered and Non-Registered.
    - *Peak Two* This will typically be in your region, area, and then be made available to one or more troops. Also, *Peak Two* events are typically available to adults, both Registered and Non-Registered. It is best to coordinate with your area training team for scheduling.
    - *Peak Three* This will typically be in your region and one or more areas. It is best to coordinate with your region training team for scheduling. Also, *Peak Three* events are usually available only to Registered Adults. Discuss with your region team whether your situation warrants an exception.
    - *Train the Trainer* This will typically be in your region and one or more areas. It is best to coordinate with your region training team for scheduling. Also, *Train the Trainer* events are usually available only to Registered Adults. Discuss with your region training team whether your situation warrants an exception.

- **RSVP Notification** List the members of your team that you want to be notified when someone RSVPs.
- **Copy the event** Copies the course using the same sponsoring region, course type, course year, and all other settings. If the sponsoring region, course type, or other settings must be changed, it would be appropriate to reproduce the course event rather than copy it.
- **Delete event** Deletes the course. No participant assigned to the course will receive credit

Update Course

When a member initially RSVPs to a course, they will appear in one of the following groups:

- Going, No Role Assigned
- Members Maybe Going
- Members Not Going

The Course Director or other staff member should assign these members to the appropriate course participation role by dragging their names over to the corresponding role section.

Course participants must be "checked" in order to receive credit for the course. They also must be assigned to a participation role.

Note the following roles and their restrictions:

- Course Director - though the web application will allow you to add more than one Course Director for a course, there should be only one Course Director per course. The Course Director will receive course credit for every course they oversee.
- Assistant Course Director - some courses provide the opportunity for one or more Assistant Course Directors. The Assistant Course Directors will receive course credit for every course they oversee.
- Staff - some courses have staff. Staff members will receive course credit for every course in which they serve.
- Participant - participants receive course credit.
- Support - support members do not receive course credit.

The group of additional invitees are those members who were specially selected on the "Event Setup" page who have not yet been assigned a participation role. These members must be assigned to a participation role.

Some additional actions may be available in certain courses:

- **Print Certificates** Generate pdf certificates for all participants who have received credit for attending the event (note that participants must have a check next to their name in order to receive a certificate)
- **Download course files** Download a current version of course files.
- **Course critique link** A course critique link is available in some courses. Recommend you provide this to participants via the event description page.

Event Overview | Event Setup

Main event setup

Active *

Yes

No

Course Type *

Peak One ✕ ▾

Sponsoring Region *

Select Region... ▾

Description

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Event Date & Time *

📅 02-27-2024 11:00 AM to 02-27-2024 12:00 PM

Timezone *

Select timezone. ▾ ︿

Event Address

Address line 1...   Address line 2... [•••]

City...   State... ⌄

Zipcode... [•••]

Advanced event details

Required Items   ☐ Medical form required   ☐ Uniform required

Event Fees | $ | |
Adult fees

Who can **view** this event?

☐ All regions

Specific regions

No Regions specified.

☐ All areas

Specific areas

No Areas specified

☐ All Troops   ⌃

Specific Troops

No Troops specified.

☐ All roles

Specific role

No roles specified.

Specific members

Good, Bennie (Trail Life Connect) - Course Director ✕   ✕

RSVP details

Notify when user RSVPs

Good, Bennie (Trail Life Connect) - Course Director ✕   ✕

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