VERSION HISTORY

[Provide information on how the development and distribution of the Training Plan was controlled and tracked. Use the table below to provide the version number, the author implementing the version, the date of the version, the name of the person approving the version, the date that particular version was approved, and a brief description of the reason for creating the revised version.]

Version #	Implemented By	Revision Date	Approved By	Approval Date	Reason
1.0	*<Author name>*	*<mm/dd/yy>*	*<name>*	*<mm/dd/yy>*	*<reason>*

UP Template Version: 12/31/08

Note to the Author

[This document is a template of a Training Plan document for a project. The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the project.

- *Blue italicized text enclosed in square brackets ([text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.*

- *Blue italicized text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a particular project.*

- *Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate to a specific project. These are offered only as suggestions to assist in developing project documents; they are not mandatory formats.*

When using this template for your project document, it is recommended that you follow these steps:

1. *Replace all text enclosed in angle brackets (e.g.,, <Project Name>) with the correct field values. These angle brackets appear in both the body of the document and in headers and footers. To customize fields in Microsoft Word (which display a gray background when selected):*

   a. *Select File>Properties>Summary and fill in the Title field with the Document Name and the Subject field with the Project Name.*

   b. *Select File>Properties>Custom and fill in the Last Modified, Status, and Version fields with the appropriate information for this document.*

   c. *After you click OK to close the dialog box, update the fields throughout the document with these values by selecting Edit>Select All (or Ctrl-A) and pressing F9. Or you can update an individual field by clicking on it and pressing F9. This must be done separately for Headers and Footers.*

2. *Modify boilerplate text as appropriate to the specific project.*

3. *To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the Section Headings are Heading 1, Heading 2 and Heading 3. Style used for boilerplate text is Body Text.*

4. *To update the Table of Contents, right-click and select "Update field" and choose the option- "Update entire table"*

5. *Before submission of the first draft of this document, delete this "Notes to the Author" page and all instructions to the author, which appear throughout the document as blue italicized text enclosed in square brackets.]*

TABLE OF CONTENTS

[Insert appropriate disclaimer(s)]

1   INTRODUCTION

1.1   PURPOSE

This *<Project Name>* Training Plan establishes procedures to plan, develop, implement, and maintain the *<Project Name>* training program and curriculum. The following objectives have been established for this plan:
- *[Enter objectives as appropriate]*

1.2   SCOPE

1.2.1   Planning Principles

Various scenarios were considered to form a basis for the plan, and multiple assumptions were made. The applicability of the plan is predicated on:

[Enter various assumptions/variables taken into account when developing this plan, or that the successful execution of this plan is dependent upon]

1.2.2   Assumptions

This section identifies the statements believed to be true and from which a conclusion was drawn to define this plan.

1. *[Insert description of the first assumption.]*
2. *[Insert description of the second assumption.]*

1.2.3   Constraints

This section identifies any limitation that must be taken into consideration regarding the content of this plan.

1. *[Insert description of the first constraint.]*
2. *[Insert description of the second constraint.]*

2   ROLES & RESPONSIBILITIES

[Describe roles and responsibilities of training staff and associated stakeholders, as it relates to the effort outlined in this training plan.]

3   REQUIREMENT & PREREQUISITES

[Describe general requirements as they relate to the planned training program. Include requirements relevant to items such as training environment, prerequisite skills, the training audience, individuals or positions needing specific training, training time frame, expectations, evaluation criteria, success factors, etc. Describe any required prerequisite skills required to support project lifecycle activities. Match those requirements to the existing personnel skill sets to determine the training need for the project or provide a reference to where it is stored.]

4   STRATEGY & APPROACH

[Describe the training approach, schedule, duration, location, dates, etc or provide a reference to where it is stored.]

4.1   TRAINING SOURCES

[Identify the source of the training (developed in-house, contracted to external agency, commercial off the shelf (COTS), etc. If in-house development is chosen, expand upon this training plan to include associated development activities and timeline for task completion and delivery of source materials.]

4.2   DELIVERY METHOD

[Describe the method of delivery selected for the training program. Include reference to any plans to pilot test training. If multiple delivery methods are planned, provide an explanation detailing this or provide a reference to where it is stored.]

4.3   DEPENDENCIES AND LIMITATIONS

[Identify any dependencies and/or limitations that may impact the training strategy/program, course curriculum, materials, schedule, etc or provide a reference to where it is stored.]

5   TRAINING RESOURCES

[Identify resources necessary to support the training program. This should include human resources as well as hardware, software, facilities, etc or provide a reference to where it is stored.]

5.1 MATERIALS

[Identify the types of training materials required to support the training requirements outlined within this plan. Include reference to training items such as instructor and student guides, presentation materials, visual aids, hand outs, workbooks, manuals, demonstrations, etc or provide a reference to where it is stored.]

5.2 STAFFING

[Identify resources necessary to support the training program. Include any specific requirements related to items such as skill set, knowledge, education, experience, etc or provide a reference to where it is stored.]

5.3 EQUIPMENT

[Identify resources necessary to support the training program and the environment in which it will be implemented. Include specific requirements related to items such as hardware, software, networking, vendor selection, product type, version number, etc or provide a reference to where it is stored.]

5.4 ENVIRONMENT

[Describe any conditions, facilities requirements, size, location, temperature, etc needed to perform the training or provide a reference to where it is stored.]

6 TRAINING SCHEDULE

[Include a training schedule that is as comprehensive as possible. The schedule may change later to reflect new/updated information and project progress. This section should be organized to best illustrate for the reader of this document the planned training program or provide a reference to where it is stored.]

ID	Course Name	Instructor	Location	Date/Time	Duration
<ID>	*<Course One>*	*<Instructor>*	*<Location>*	*<Date/Time>*	*<Duration>*
<ID>	*<Course Two>*	*<Instructor>*	*<Location>*	*<Date/Time>*	*<Duration>*
<ID>	*<Course Three>*	*<Instructor>*	*<Location>*	*<Date/Time>*	*<Duration>*

7 TRAINING EVALUATION

[Describe how the overall training program and curriculums will be evaluated. Describe evaluation metrics and tools. Define how they will be evaluated. Explain how they may influence changes in the program, curriculums, course materials, and training approaches or provide a reference to where it is stored.]

8 TRAINING SECURITY & UPDATES

8.1 ACCESS TO TRAINING MATERIAL

[Identify resources, access, permissions, and access duration allowed to training materials. Describe the process for obtaining and changing access permissions and any resources used to secure such materials or provide a reference to where it is stored.]

8.2 ACCESS TO TRAINING ENVIRONMENT

[Identify resources, access, permissions, and access duration allowed to training environment. Describe the process for obtaining and changing access permissions and any resources used to secure the environment or provide a reference to where it is stored.]

8.3 UPDATING TRAINING RESOURCES

[Describe the process for updating training programs, curriculums, environments, and supporting materials. Include the process for identifying and collecting required/requested changes, how prospective change will be evaluated, prioritized, and incorporated into future iterations of training. Explain how revision history will be maintained and tracked or provide a reference to where it is stored.]

Appendix A: Training Plan Approval

The undersigned acknowledge they have reviewed the *<Project Name>* **Training Plan** and agree with the approach it presents. Changes to this **Training Plan** will be coordinated with and approved by the undersigned or their designated representatives.

[List the individuals whose signatures are desired. Examples of such individuals are Business Steward, Implementation Manager or Project Sponsor. Add additional lines for signature as necessary. Although signatures are desired, they are not always required to move forward with the practices outlined within this document.]

Signature: _____   Date: _____

Print Name: _____

Title: _____

Role: _____

Signature: _____   Date: _____

Print Name: _____

Title: _____

Role: _____

Signature: _____   Date: _____

Print Name: _____

Title: _____

Role: _____

[Insert appropriate disclaimer(s)]

APPENDIX B: TRAINING CURRICULUM

[Describe the curriculum for each proposed training class or provide a reference to where it is stored.]

Curriculum One

[Describe training curriculum one or provide a reference to where it is stored.]

Curriculum Two

[Describe training curriculum two or provide a reference to where it is stored.]

Curriculum Three

[Describe training curriculum three or provide a reference to where it is stored.]

[Insert appropriate disclaimer(s)]

APPENDIX C: REFERENCES

[Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.]

The following table summarizes the documents referenced in this document.

Document Name and Version	Description	Location
<Document Name and Version Number>	*[Provide description of the document]*	*<URL or Network path where document is located>*

[Insert appropriate disclaimer(s)]

APPENDIX D: KEY TERMS

[Insert terms and definitions used in this document. Add rows to the table as necessary. Follow the link below to for definitions of project management terms and acronyms used in this and other documents.

http://www2.cdc.gov/cdcup/library/other/help.htm

The following table provides definitions for terms relevant to this document.

Term	Definition
[Insert Term]	*[Provide definition of the term used in this document.]*
[Insert Term]	*[Provide definition of the term used in this document.]*
[Insert Term]	*[Provide definition of the term used in this document.]*

[Insert appropriate disclaimer(s)]