3/26/24 version ***Planning Form – Virtual Training***

We are delighted to work with you on setting up a training!

**This form serves as a written contract between Treatment Innovations and your organization.** If you have any additional contract or paperwork, please send that to us.

Please **email this form to training@treatment-innovations.org** **at least 4 weeks prior to the training** or the training is not guaranteed. We’ll put you in touch with the trainer after this Planning Form is reviewed.

**A. Schedule and Content**

1. **Training Date(s)** \_\_\_\_\_\_\_ **Start and End Time(s)** \_\_\_\_\_\_\_  **Your time zone** \_\_\_\_\_\_\_

*Note: a 1-day training is 6 hours of teaching time, typically 9a-4p (this includes a half hour lunch and two 15-minute breaks, one mid-morning and one mid-afternoon). You can adjust the start / end time and length of breaks.*

List details about breaks here (and/or let the trainer know directly when you speak): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

2. **Timed agenda and objectives** can be downloaded from our [training topics page](https://www.treatment-innovations.org/topics-we-train-on.html). Please use one of the titles listed; if you prefer a different title, email us to confirm it.

3. **Handouts (required).** Please be sure to provide the handouts (or links to them) to your attendees in advance as the training exercises require them. You can download them from our [training handouts page](https://www.treatment-innovations.org/trg-handouts.html) (select the relevant ones for your training). Initial here to confirm \_\_\_\_\_.

*Notes:*

*(a) Our PowerPoint slides aren’t available for distribution; the handouts provide all that’s needed for the training.*

*(b) To conduct any of our models, all providers need their own book, per the publisher’s* [*copyright requirements*](https://www.treatment-innovations.org/faq-materials.html)*. However, attendees do not need a book at the training.\**

*\*Exception: if your entity bills the Los Angeles County Dept. of Mental Health for Seeking Safety services, the County requires each provider to have the book during the training, so it would need to be* [*ordered ahead*](https://www.treatment-innovations.org/books.html)*.*

4. **Speaker bio** (optional): see the [trainer information](https://www.treatment-innovations.org/about-us.html) on our website.

5. **Conference?** If the training is part of a conference, list the registration website or contact person here and we’ll post it on our website: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**B. Webinar Details**

1. **We use our Zoom** to ensure that features the trainer needs are available to them; please initial to confirm this is ok: \_\_\_. Or if your organization needs to provide the conference platform, initial here \_\_\_ and we’ll follow up via email.

2. **Zoom co-host at your location:**  Name \_\_\_\_\_\_\_ Email \_\_\_\_\_\_\_ Phone (preferably cell) \_\_\_\_\_\_\_

*When using our Zoom account, the trainer will assign this person as co-host on Zoom (in case of technology issues or to assist your staff if needed). The co-host needs to be available from a half hour before the training through the end of the training. Even if you provide the Zoom, please be sure to list a training-day contact person above.*

3. **What is the maximum number of attendees**? \_\_\_\_\_\_\_. Our Zoom has a limit on break-out rooms, which are needed for training exercises so please accurately identify the maximum.

4. **The Zoom link**-- we will send the Zoom link to you at least two weeks before the training date; if you need it sooner, please specify your deadline: \_\_\_\_\_.

5. **No recording is allowed** of any training provided by us, including webinars,in any format (video, audio, etc.). Please initial to confirm this:  \_\_\_\_ .

*A professionally-produced set of* [*Seeking Safety training videos*](https://www.treatment-innovations.org/store/p298/Set_of_all_4_Seeking_Safety_Training_DVDs_%284.5_hours_total%29.html) *is available, if desired.*

6. **A trial run** **of Zoom with the trainer** ahead of time is highly recommended, regardless of who provides the Zoom. Please initial to confirm \_\_\_.

7. **The Zoom attendance report** can be sent to you after the training at no cost. If you’d like that, initial here \_\_\_.

8. **Certificates for continuing education (CE) and/or attendance** are available for a fee. See our [certificate information page](https://www.treatment-innovations.org/all-ceu-info.html) including types, costs, and procedures. Initial here \_\_\_ if you’re potentially interested and we’ll follow up after the training. You can, if preferred, create CE or attendance certificates yourself.

***30-day deadline****: we rely on the automated Zoom report to verify attendance; it is only available for 30 days after the training. If you’d like certificates of any kind, be sure to let us know within that timeframe.*

**C. Financial Information**

1. **The** **speaker fee** for the training will be per our most recent communication on the rate; initial here to indicate your agreement on this \_\_\_\_\_\_\_\_. If you’re unclear on the rate, email [training@treatment-innovations.org](mailto:training@treatment-innovations.org) for written confirmation.

2. **Please do not discuss fees, contracts, invoicing, or any other financial details with the trainer.** The trainer is hired by

us and is not privy to these details nor at liberty to make financial commitments on our behalf. Initial here to confirm: \_\_\_\_.

3. **Cancellation** less than three weeks prior to the scheduled date typically incurs a cancellation fee of $100 due to the time, effort, and inability to rebook that date (but this is not a requirement). Is this acceptable? ☐ Yes   ☐ No

4. **Charging attendees** is only allowed with prior written approval by us. Most entities train just their internal staff and don’t charge anyone to attend. But we can negotiate a written agreement in advance if needed (and at least 6 weeks prior to the training).

Please initial **one** below:

a. \_\_\_\_\_ This training is only for internal staff; no one will be charged; and the training will not be advertised or posted publicly.

**OR**

b. \_\_\_\_\_ I already have a written agreement with Treatment Innovations for charging individuals and/or other entities to attend the training. *If you mark this, please forward the written agreement or give specifics here: \_\_\_\_\_\_\_\_\_\_\_\_\_.*

**OR**

c. \_\_\_\_\_ I would like to negotiate a written agreement with Treatment Innovations to charge individuals and/or other entities to attend the training and agree the training isn’t confirmed until an agreement is in place.

5. **Invoicing:**

a.We invoice within 6 weeks of the training date; and for phone consultations, at the end of the project. If a different deadline is needed list that here (but for phone consultation, not more often than quarterly please): \_\_\_\_\_.

b. If there are any invoicing aspects you need to let us know, please list them here: \_\_\_\_\_.

**D. After the Training**

1. **We welcome your feedback**. You can:

* Provide confidential feedback via our online [training feedback form](https://forms.gle/z81X5ABAuJBQRNAd7).
* Contact Jamie Miller, training coordinator, at [coordinator@treatment-innovations.org](mailto:coordinator@treatment-innovations.org) or 617-299-1610 (text or call).

2. **Various further training options are available to support your staff**, including:

* Zoom consultation [theme-based calls](https://www.treatment-innovations.org/tbcs--consults.html)
* Fidelity and/or supervisor [certification](https://www.treatment-innovations.org/certs.html)
* [Advanced training](https://www.treatment-innovations.org/many-topics-we-train-on.html)
* See our [training topics page](https://www.treatment-innovations.org/topics-we-train-on.html) for ideas.

3. **See our** [book information page](https://www.treatment-innovations.org/books.html) if your staff plans to implement any of our models (they would each need a book, which is

available as paperback or ebook).

**Questions?** Email [training@treatment-innovations.org](mailto:training@treatment-innovations.org). We’re happy to help!

**Thanks!**