**ANNUAL TRAINING PLAN TEMPLATE**



COMPANY NAME

Street Address, City, State, and Zip

webaddress.com

Version 0.0.0 | mm/dd/yy

| VERSION HISTORY |
| --- |
| VERSION | APPROVED BY | REVISION DATE | DESCRIPTION OF CHANGE | AUTHOR |
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| **APPROVED BY** | Name | **TITLE** | Title | **DATE** | MM/DD/YY |

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## INTRODUCTION

# Include your organization’s mission and vision statements and describe your customer base.

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# BACKGROUND

Describe the type(s) of training needs assessment(s) conducted during this annual cycle. For example, you could include an individual development plan, an organizational needs assessment, or a customer satisfaction survey.

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# CRITICAL AND/OR IMMEDIATE TRAINING NEEDS

List the critical or immediate training needs that, when met, will have the biggest direct impact on your organization.

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| CRITICAL / IMMEDIATE NEED | TRAINING | NOTES |
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# TRAINING GOALS, OBJECTIVES, PERFORMANCE METRICS, AND OUTCOMES

Describe your organization’s training goals, objectives, performance metrics, and outcomes. Goals may change from year to year, so your annual review process should include the opportunity to add, modify, or delete previous goals. However, in order to properly assess your progress, you must include clear metrics by which you will measure success. Also, depending on the organization or intent of the plan, you may need to include data in this section.

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| GOAL | OBJECTIVE | PERFORMANCE METRIC | OUTCOME |
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# RESOURCES

List the resources — budget and staff — necessary to implement your training plan. A solid understanding of how your training needs translate to budget and resource planning enables you to successfully forecast project costs and duration and will also improve future planning. Once you’ve identified all your resource needs, you can allocate them to different roles, departments, or programs.

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| TRAINING BUDGET | TRAINING STAFF | FULL-TIME EQUIVALENTS (FTE) | ESTIMATED TRAINING STAFF TRAVEL FUNDS |
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# CORE TRAINING PROGRAMS, PROJECTS, AND ACTIVITIES

List the core training activities and services provided by each training function to your organization. Describe each training activity in terms of the “driver” (a need that is not currently being met) and how the training will impact that area of need.

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| DRIVER | TRAINING PROGRAM / PROJECT / ACTIVITY |
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# MANDATORY TRAINING

# List any mandatory trainings required within your organization. (For example, mandatory trainings might include compliance training or training that is required by statute, regulation, DOE directives, and/or contract management obligations.)

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| MANDATORY TRAINING | COMPLETED BY |
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# ADDITIONAL TRAINING

List additional, non-mandatory trainings that you are offering.

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| --- | --- |
| TRAINING | DATE(S) / TIME(S) OFFERED |
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# REVIEW SCHEDULE

Draft a schedule for periodic review and revision of all documentation of your training (for example, individual development plans, conduct of needs assessments, etc.) as well as an evaluation of the training program as a whole.

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| DELIVERABLE | REVIEW DATE / MILESTONE |
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****NOTE: Revising Your Plan

Once you have completed your basic annual training plan, ensure that periodic updates, reviews, and revisions are a part of your overall strategic plan. Continually updating your annual training plan will help you improve upon existing processes, measure growth, and identify competencies and weaknesses. Ultimately, it will also help your organization and staff grow. You may even need to revise the plan during its first year to better support overall organizational objectives and take advantage of new opportunities.

# Appendix

Attach health and safety checklists, diagrams, and other supporting documents, or include with pertinent procedures.

| DOCUMENT NAME | DESCRIPTION | LOCATION |
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