**Course Planning Checklist**

**Instructions:** Use this checklist to gather the items you’ll need to submit to Organizational Development (HR-OD) to get your course operationally ready and live for registration.

* ******Once you have all items on the checklist gathered and prepped, send everything over in an email to OrganizationalDevelopment@cityofmadison.com.
* If you have more than one course you’re submitting planning information for, please send a **separate email** for each individual course.
* You’ll receive a confirmation email once received.
* You can expect proofing email(s) for each course as we begin to build them.

# **Step 1: Schedule** your course date(s).

* **Start by selecting the date(s), time(s), duration, and number of sessions for your course.** Even if all course details aren't finalized yet, securing your time(s) early helps ensure availability.
	+ **Use the ever-updated** [**2026 HR-**OD Calendar Availability spreadsheet](https://cityofmadisonwi.sharepoint.com/%3Ax%3A/t/HR-OD/ERbVYRjTXRxMoGM0rREIzykBHAJiZuHu7XcyziQalA4aVw)to check what’s still open.

# **Step 2: Plan** your details.

Gather and submit all required course details – via the Course Planning Form and Checklist – so your course is operationally ready for registration. This is where you define course scope, audience, format, learning objectives, and prep items. You can find these items on our [Learning Partners > Course Development Process webpage, under “Step 2: Plan” Tools](https://www.cityofmadison.com/employeenet/professional-development/learning-partners-hub/course-development-process).

**Filling out the Course Planning Form:**

1. **Course Date & Scheduling Information**
	* Step 1 is always reserving your date(s) with HR-OD to ensure that we have a time for you to host your course. On the Course Planning Form, you’ll see acknowledgements to ensure that this is completed.
2. **Course Detail Information**
	* **Course Title & Description –** Explain what learners will learn from your class and hook them on the topic.
	* **Course Summary –** a 25-word maximum summary for your course. Think of this as your marketing blurb.
	* **Learning Objectives –** Outline exactly what participants should be able to do differently by the end of your course. We recommend no more than five (5).
	* **Course Materials –** Please send all course materials to the HR-OD inbox **at least four (4) weeks prior to your course date.** Posting these items on the course page is a **standard practice** when working with HR-OD. This allows for folks with access needs to have adequate time to review materials, arrange accommodations, and engage equitably from the day they register! ​
		+ If changes are made, please send an updated document to HR-OD **at least seven (7) days prior to the course date.**
	* **Learning Topics** – select the topic(s) your course most aligns with.
	* **Course Image** – select a course image and send it to HR-OD with your Course Planning Form to be used as your course marketing and registration image.
	* **Any Pre-Requisite Courses?** – Please share if there are any courses learners should attend before attending yours.
3. **Facilitator Information**
	* Create a 3-5 sentence long bio and share contact information.
	* If you’ve facilitated a course with us before, you are likely already on our [Meet Your Instructors webpage](https://www.cityofmadison.com/human-resources/organizational-development/courses/meet-your-instructors).
4. **Additional Information**
	* **Target Audience(s)** – Indicate who your intended audience is.
	* **Maximum Number of Learners** – Indicate the maximum number of learners you want in the space.
	* **City Partner Seats** – Indicate whether you want seats available to [City Partners](https://www.cityofmadison.com/human-resources/organizational-development/courses/city-partners).
	* **Day-Of Course Support –** Indicate whether you need HR-OD support and what kind of support you might need when you’re facilitating your course.
	* **Recurring Zoom or Teams Link** – Share your preferences and link if applicable.

**We know that details may change, so just email us at** **OrganizationalDevelopment@cityofmadison.com** **with a heads-up.**

# **Learning Partners Hub**

Check out the [Learning Partners Hub webpage](https://www.cityofmadison.com/employeenet/professional-development/learning-partners-hub) for additional details and next-steps once you submit your Course Planning Form(s).

You’ll also find information about the following in the hub:

* [**2026 Learning Partner Program Deadlines**](https://www.cityofmadison.com/employeenet/professional-development/learning-partners-hub/2026-lp-program-deadlines)
* [**Course Development Process**](https://www.cityofmadison.com/employeenet/professional-development/learning-partners-hub/course-development-process) **–** *your tasks, tools, FAQs, and deadlines found here.*
* [**Course Evaluation Link**](https://www.cityofmadison.com/employeenet/professional-development/learning-partners-hub/course-evaluation-link)
* [**Course Building Toolkit**](https://www.cityofmadison.com/employeenet/professional-development/learning-partners-hub/course-building-toolkit)
* [**Marketing Your Course**](https://www.cityofmadison.com/employeenet/professional-development/learning-partners-hub/marketing-your-course)
* [**Cancel or Reschedule Your Course**](https://www.cityofmadison.com/human-resources/organizational-development/courses/cancellation-policies)

View [**Learning Partners Commitments**](#_Learning_Partners_Commitments) on the next page.

# **Learning Partners Commitments**

### **Instructor Expectations**

To the best of their ability, LPs will be expected to…

* Respond within 48 hours to emails and communicate *at least* 24 hours in advance if unable to meet a deadline
* Communicate any support needed from the HR-OD Team
	+ You can expect several communications from HR-OD checking in about registration numbers, marketing needs, access needs of learners, and general logistics as your course date approaches.
* Commit to delivering an inclusive and innovative learning experience that helps all City of Madison employees thrive.
* Focus on the learner, create and protect an inclusive learning space, and deliver with confidence.
* Proactively ask for feedback from learners and apply continuous improvement efforts suggested in that feedback to content.
	+ Best practice is to allow 3-5 minutes at the end of your course to ask your learners to share their feedback on how the session went via the City of Madison Course Evaluation Form.
	+ Become familiar with and follow the [HR-OD Cancellation Policies](https://www.cityofmadison.com/human-resources/organizational-development/courses/cancellation-policies). If you need to cancel or reschedule for any reason, reach out to OrganizationalDevelopment@cityofmadison.com ASAP.


### **Our Commitment to Inclusive Learning Spaces & Racial Equity**

At the City of Madison, we acknowledge the historical role government has played in creating racial disparities and we believe we can play a role in removing barriers by addressing racial disparities in our policies, procedures, and norms. We value racial equity and accept our role as individuals to create a more inclusive workplace.

* + - [Inclusive Language for Facilitators](https://www.cityofmadison.com/employeenet/inclusive-language-for-facilitators)
		- [Tips to Make Virtual Training Engaging (Tip Sheet)](https://www.cityofmadison.com/human-resources/organizational-development/learning-partners-program/course-building-toolkit)


### **Communication**

Communication is key! If you have questions, concerns, or need assistance at any point in the course creation or building process or just want to learn more about becoming a Learning Partner, don’t hesitate to reach out to us. All communications should go to the OrganizationalDevelopment@cityofmadison.com inbox.

You can expect several standard communications from HR-OD once your course is scheduled and live for registration. These communications serve as check-ins around registration numbers, marketing needs, access needs of learners, and general logistics as your course date approaches.



### **Marketing**

Every LP course is marketed from HR-OD in the form of weekly e-Blasts to All Email Users. Included on the [Learning Partners Program webpage](https://www.cityofmadison.com/employeenet/professional-development/learning-partners-hub) are ideas for how to market for your course in addition to those weekly emails.

* **Course Highlight Emails:** If registration numbers are lower than expected, LPs might be encouraged to send out Course Highlight Emails created by the HR-OD Coordinator from your respective individual and/or department email addresses. *Specifically, if registration numbers are lower than expected.*

**Course Planning feels better with support.**

Let the Organizational Development team help you design, deliver, and evaluate the best course for your audience.

Get in touch with us at OrganizationalDevelopment@cityofmadison.com.