

# Staff Training Plan

Checklist · UK · Published 2026-10-26 · Square brackets are placeholders to replace with your own details.

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A staff training plan is a forward-looking schedule of the training a team or a person still needs: for each role, the skill or SOP to be learned, how it will be taught, who will train it, the date it should be done by, and who signs it off when it is. Where a training record shows what has already happened, the plan shows what happens next and who is responsible for it.

Training slips when it lives in a manager's head. A starter shadows whoever is on shift, a new procedure goes out by email, and refreshers wait for a quiet week that never comes. HSE's leaflet on health and safety training says: "You should make sure that you properly prioritise and plan the training needs for your business." A written plan with names and dates is the simplest way to do that, and its review section shows whether the training worked.

This template gives you the plan header, a planning grid with the six columns most plans need (Role, Skill or SOP, Method, Trainer, Target date and Signed off), guidance on deciding what goes in, setting priorities and choosing methods, and a review section for checking that the training worked and carrying gaps into the next plan.

## How to use this plan

This plan schedules the training [Your company] will deliver at [site/team] over [period, for example the next quarter]. Each row is one piece of training for one role or one person: what will be learned, how, from whom, by when, and who signs it off.

Build it from the gaps, not from a course catalogue. The role requirements grid in your training matrix says what each role needs, and the team matrix shows who has it and what is coming due. Whatever is missing, due or changing goes into this plan.

When an item is signed off, record it in the person's training record and the team matrix the same day, then initial the Signed off column here. At the end of the period, complete the review section and carry anything unfinished into the next plan.

## Plan details

- Site or team: [site/team]
- Period covered: [start date] to [end date]
- Plan owner: [name, role] | Prepared on: [date]
- Based on: training matrix dated [date]; risk assessments [references]; starters and role changes expected [names or numbers]; procedure or equipment changes due [list]
- Consulted: [employees or their representatives, and how]. HSE's leaflet says: "You should consult your employees or their representatives on the planning and organisation of the training."
- Time set aside for training: [hours per person or per week], in working hours.

## Training plan

One row per item. Use the role when the training is for a whole group, or a name when it is for one person. Write the target date as a date, not "as soon as possible": a row without a date is a wish.

Complete the Signed off column only when competence has been checked and the training record updated: the initials of the person who signed it off, and the date.

Training plan — the first rows are worked examples; the blank rows are for you to complete.

| Role                                   | Skill or SOP                                 | Method                                                               | Trainer      | Target date                         | Signed off       |
|----------------------------------------|----------------------------------------------|----------------------------------------------------------------------|--------------|-------------------------------------|------------------|
| [Example] New starter — [role]         | Fire safety and evacuation for this building | Walk the escape routes and the assembly point, then a question check | [name, role] | Before the first unsupervised shift | [initials, date] |
| [Example] All [role] staff             | [Procedure name and version], re-vised       | Briefing on what changed, then an observed task                      | [name]       | [date before the change goes live]  |                  |
| [Example] [Name], moving to [new role] | [Equipment or system] for the new role       | Coaching on the job with [buddy name], then a supervised shift       | [name]       | [date]                              |                  |
| [Example] [Role], refresher due        | [Training item] re-fresher                   | [method]                                                             | [name]       | [date before the due date]          |                  |
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## Deciding what goes in the plan

1. Start with HSE's first step: "Identify the skills and knowledge needed for people to do their job in a safe and healthy way. Compare these against people's current skills and knowledge and identify the gaps." The role requirements grid and the team matrix do most of this work.
2. Add every new starter, and everyone changing job or taking on extra responsibilities, with the items their role needs.
3. Add the refreshers and certificate expiries that fall due in the plan period, taken from the team matrix.
4. Add training for anything that is changing: new equipment, new or revised procedures, new products or services. HSE says: "Staff will need extra training if you get new equipment or your working practices change."
5. Look back at what has gone wrong since the last plan. HSE's leaflet says: "Review your experience of injuries, near misses or cases of ill health." Add training where an incident, a complaint or an audit finding points to a gap.
6. Add the development requests your team has made, including any formal requests for time off to train, with the decision on each.

## Setting priorities

When everything cannot happen at once, start with what HSE's leaflet says priorities should include:

- "those where lack of information and/or training might result in serious harm"
- "those that benefit the largest numbers of staff"
- "new recruits or those new to the working environment"
- "people changing jobs, working practices or taking on new responsibilities"
- "people using new equipment"
- Then refreshers coming due, then development training. Whatever the order, nobody does a task unsupervised until the training it needs is signed off.

## Choosing the method

HSE's leaflet defines training broadly: "Training means helping people to learn how to do something, telling people what they should or should not do, or simply giving them information." The methods it lists include "giving information or instruction", "coaching or on-the-job training", "training in the 'classroom'", "open and distance learning", "in groups or individually" and "computer-based or interactive learning".

- Procedures and SOPs: read the procedure, see it demonstrated, then do it under observation.
- Equipment: a demonstration, supervised use, then sign-off on your own equipment. Check any earlier certificate rather than assuming it.
- Knowledge topics: a short briefing or e-learning module with a knowledge check.
- Service standards and behaviours: coaching on the job, with feedback during the shift.
- Decide how you will check each item worked before you deliver it, and write the check into the Method column.
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Plan for language, literacy and disability: [arrangements]. HSE's leaflet says: "You should make sure that you meet the training needs of all of your workforce".

- Book the time in working hours. HSE says: "Health and safety training should take place during working hours and must be free for employees."

## Trainers and sign-off

- Every trainer is named, and is either signed off on the item they are training or an external provider whose course you have checked against your procedure.
- Give trainers time to prepare. HSE's leaflet says: "Make sure the trainer has enough time to prepare themselves, their resources and the venue".
- The person who signs off checks competence (an observed task, a knowledge check, test pieces) and records how in the training record.
- An item is signed off only when the training record and the team matrix are updated. Until then it stays open on this plan.
- If a target date is missed, give the row a new date and a reason, and keep any restriction on unsupervised work in place until the item is signed off.

## Review: did the training work?

Review the plan at the end of the period, and sooner if something goes wrong. HSE's fifth step is to check that the training has worked, and its leaflet suggests questions including:

- "Do your employees understand what you require of them?"
- "Are they actually working as they have been trained to?"
- "What feedback are you getting from line managers and the people who have been trained?"
- "Was the most suitable training method used?"
- "Is further information and/or training needed?"
- "Has there been a change in behaviour and practice?"

Plan review — one row for each item that was late, not done, or did not work

| Plan item                                    | Done by the target date? (Y/N) | Evidence it worked                                   | Gap or change needed                                     | Carried to the next plan? (Y/N) |
|----------------------------------------------|--------------------------------|------------------------------------------------------|----------------------------------------------------------|---------------------------------|
| [Example] [Procedure name], all [role] staff | N — [2] of [6] still to do     | Observed checks on [date]: [4] of [4] done correctly | Night shift missed the briefing; run a session on nights | Y                               |
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## Review sign-off and the next plan

- Items completed: [number] of [number]. Overdue at review: [number], with restrictions in place: [yes/no].
- Training records and team matrix updated to match this plan: [yes/no], checked by [name].
- Changes to the role requirements grid arising from this review: [details or none].
- Feedback gathered from: [line managers, people trained, representatives].
- Reviewed by: [name, role] on [date]. Next plan period: [start date] to [end date], prepared by [date].

## Records and data protection

Keep the plan with the training matrix and the training records at [system/location]. A plan that names individuals is personal data, and GOV.UK's summary of the data protection principles says information must be "kept for no longer than is necessary". Set how long you keep old plans in your data retention policy ([retention period]).

Owner of this plan: [name/role]. Next review due: [date].

## How to use this template

1. Bring your training matrix up to date first, so the plan starts from who needs what rather than from memory.
2. Add every gap, refresher and change for the period, then order them using the priorities in the Setting priorities section.

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3. Name a trainer and a real target date on every row, and book the time in working hours.
4. Decide how each item will be checked before it is delivered, and sign it off only when that check is passed.
5. Update the training record and the team matrix on the day each item is signed off.
6. At the end of the period, complete the review, carry unfinished items forward with new dates, and start the next plan.

**Official guidance**

- › [HSE — Health and safety training: A brief guide \(INDG345, PDF\)](#)
- › [HSE — Decide what training and information you need](#)
- › [HSE — Provide information, training and supervision](#)
- › [GOV.UK — Training and study at work: your rights](#)

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