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COURSE BROCHURE

# Annual Training Calendar and Learning Budget Control Training Course

22 – 26 March 2027
Rome

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# Annual Training Calendar and Learning Budget Control Training Course

**Ref:** 1183_44452 **Date:** 22 – 26 March 2027 **Location:** Rome **Fees:** 6200 GBP

Annual Training Calendar and Learning Budget Control is a 1-week training course for training managers and L&D budget holders, and each participant leaves with a costed annual training calendar and a monthly spend tracker ready for approval. As budgets face mid-year cuts and requests multiply, a calendar tied to priorities and monitored spend keep learning credible. The course reflects how Jupiter Prime Training approaches Annual Training Calendar and Learning Budget Control.

## Why Annual Training Calendar and Learning Budget Control Matters Now

Three pressures shape the subject today: finance teams that freeze or claw back unspent funds, departments competing for limited seats and trainer days, and external providers whose prices and quality vary widely. Training units that plan and control well deliver the agreed calendar within budget and defend it in review meetings; those that plan loosely overspend early, cancel late and lose influence. The course draws on ISO 30422:2022 for the learning and development process and ISO 10015:2019 for linking people development to competence needs.

## Who Gains Most from Annual Training Calendar and Learning Budget Control

- Managers who own the yearly learning calendar and its budget line
- Coordinators who schedule sessions, venues and trainers
- HR staff consolidating requests from several departments
- Procurement contacts negotiating with external training providers
- Finance partners monitoring people-development spend

A training unit that sends its manager and coordinator together gains most, because both return using one calendar format and one spend tracker.

## Annual Training Calendar and Learning Budget Control Capabilities

Participants practise turning a long list of requests into a scheduled, costed and monitored year of learning.

- Build a prioritisation matrix that ranks requests by business need and urgency — department heads competing for places
- Design an annual calendar that balances seasons, workloads and trainer availability — operations managers
- Calculate the unit cost of each activity, including internal time and venues — the budget holder
- Specify vendor selection criteria and service levels for external providers — procurement
- Assess monthly variance between planned and actual spend — finance partners
- Communicate quarterly plan status and reforecasts in a short report — senior sponsors

## Key Annual Training Calendar and Learning Budget Control Terms

- Annual training calendar — the scheduled list of all learning activities for the year, with dates, audiences and owners.
- Cost per participant — total activity cost divided by the number of attendees, used to compare options.
- Budget variance — the difference between planned and actual spend for a period, shown as an amount or percentage.
- Reforecast — an updated estimate of year-end spend based on actual results so far.
- Service level agreement — a written statement of the quality, timing and conditions a training provider must meet.
- Utilisation rate — the share of planned seats or trainer days actually used.

## Annual Training Calendar and Learning Budget Control Day by Day

### Day 1: From Requests to Priorities

- Request Intake Template — Capturing Needs Consistently Across Departments
- Prioritisation Matrix by Business Need and Urgency — Ranking Competing Requests
- ISO 30422:2022 Learning Process Links — Placing the Calendar in Context
- Mandatory Versus Discretionary Learning Split — Protecting Compliance Activities
- Capacity Check of Trainers and Rooms — Setting a Realistic Ceiling

### Day 2: Building the Annual Calendar

- Calendar Layout by Quarter and Audience — Avoiding Peaks and Gaps
- Seasonality and Operational Blackout Periods — Respecting Business Cycles
- Delivery Mode Choices — Weighing Classroom, Virtual and Blended Options
- Seat Allocation Rules for Departments — Sharing Limited Places Fairly
- Examples From Retail and Energy Companies — Comparing Calendar Designs

### Day 3: Costing and Allocating Budget

- Activity Cost Build-Up — Including Fees, Time, Travel and Venues
- Cost per Participant Comparison — Choosing Between Delivery Options
- Budget Allocation by Department and Priority — Matching Funds to Need
- Contingency Reserve Setting — Absorbing Late Requests and Price Changes
- Budget Submission Pack — Presenting the Calendar to Finance

### Day 4: Vendors, Tracking and Reporting

- Vendor Selection Scorecard — Comparing Providers on Quality and Value
- Service Level Agreement Clauses — Securing Dates, Trainers and Cancellation Terms
- Monthly Spend Tracker and Variance Review — Spotting Overspend Early
- Utilisation and Cancellation Monitoring — Reducing Wasted Seats
- Quarterly Reforecast and Status Report — Keeping Sponsors Informed

## Day 5: Practising the Costed Annual Training Calendar

- Prioritisation Matrix Applied to Participant Requests — Fixing the Activity List
- Calendar Draft Peer Review — Testing Balance and Feasibility
- Cost Build-Up and Allocation for Each Activity — Closing the Budget
- Spend Tracker Set-Up With Variance Thresholds — Preparing Monthly Control
- Costed Annual Training Calendar Completion — Ready for Approval

## Applying Annual Training Calendar and Learning Budget Control After the Course

- Run the prioritisation matrix on all pending requests and agree the ranked list with department heads.
- Set up the monthly spend tracker with variance thresholds and present the first quarterly reforecast to finance.

## Annual Training Calendar and Learning Budget Control Questions FAQ

### What is annual training calendar and learning budget control, and why does it matter now?

It is the practice of scheduling a year of learning from priorities and keeping its spend on track. It matters now because budgets face cuts and finance teams reclaim unused funds.

### Which roles gain most from annual training calendar and learning budget control?

Training managers, coordinators and L&D budget holders gain most, along with finance and procurement partners.

### How does annual training calendar and learning budget control differ from a training ROI course?

It focuses on planning, costing and monitoring spend during the year. A ROI course measures the financial return of individual initiatives after they run.

### What do you bring back from annual training calendar and learning budget control?

You bring back a costed calendar, a prioritisation matrix, a vendor scorecard and a monthly spend tracker.

## Annual Training Calendar and Learning Budget Control: The Way Forward

The costed annual training calendar first informs which requests are funded in the coming year and which wait. Training managers, finance partners and department heads use it to agree seats and spend. After the first quarter, revisit the variance and utilisation figures to see whether the allocation rules need adjusting.