

# *Planning a Workshop?*

Workshops provide excellent opportunities for sharing ideas, networking, and planning. If you are the planner, there are two essential tasks before you start planning the workshop: 1) Allow **plenty of time** to do a good job; and 2) **get help!** You could ask people to help or you can form a workshop committee. Also, check to see if there are others who have done this before that have lists that would help in planning the event. Whatever option you choose, this brief guide will help in planning your workshop.

## *First Steps*

### **Allow Plenty of Time**

The most common mistake in planning a conference or workshop is not allowing enough time to get done what has to be done. Many successful larger events begin over a year in advance of the actual program. For a single workshop event, 6 months is ideal, but certainly do not attempt to prepare a workshop event with less than 4 months of lead time.

#### ***Checkpoint:***

- I have less than 4 months. **STOP** and rethink the date... or wait until next year!*
- I have over 4 months. **CONTINUE***

### **Form a committee**

Planning a workshop requires considerable effort, and it helps if there are other people to share the load. It may be helpful to form two groups: a committee to do the actual organizing and running of the workshop, and a reference group who can advise on different aspects of its preparation. Members of the reference group may be people who have previously been involved in running the workshop, or who would like to be involved in the workshop organization, but are unable to because of other commitments. So your first assignment is to form a committee and hold a meeting.

#### ***Checkpoint:***

- I don't have any help. **STOP** and rethink.*
- I have help. **CONTINUE***
- I have not announced a committee meeting date. **STOP** and do so quickly.*
- I have announced a time for a committee meeting. **CONTINUE***

# *4-6 months before the event.*

## **First committee meeting...**

In many ways your first committee meeting is the most important. It will be at this time that you should agree upon the purpose of the workshop, set the timeline, agree upon tasks, and delegate responsibility for tasks. The following is an agenda of things you will want to include on the agenda at this first meeting...

- introduce committee members to each other
- brief everyone on the task at hand
- identify the purpose of the workshop
- discuss the title and theme for the workshop
- estimate your budget
- if not already done, establish the date (Decide a date range. Decide dates that will not work. Decide which days of the week you are prepared to consider.)
- review or create a time line for planning the workshop (dates for committee meetings, selection on a site and curriculum, drop-dead dates for securing the location and presenter)
- target minimum and maximum numbers of attendees
- brainstorm a list of possible places to hold the event.

### **Checkpoint:**

- We have not addressed all of the above items. **STOP** and complete all items.
- We have discussed all of the above items. **CONTINUE** the meeting by creating a list of tasks which must be completed

## **Creating a task list...**

Tasks for a workshop will vary from one event to another. You will want to review the following list to determine the tasks that are appropriate to your event. If you feel a task is applicable to your event, you will want to review the task descriptions that are found on pages 3-7...

- |   |  |
|---|--|
| • <b>title and theme</b>                | • <b>transportation and accommodations</b> |
| • <b>location</b>                       | • <b>audio-visual equipment</b>            |
| • <b>curriculum</b>                     | • <b>food and refreshments</b>             |
| • <b>budget</b>                         | • <b>registration</b>                      |
| • <b>sponsorships/scholarships</b>      | • <b>evaluation</b>                        |
| • <b>program and other publications</b> | • <b>other</b>                             |
| • <b>workshop presenter</b>             |  |
| • <b>keynote speakers</b>               |  |

### **Checkpoint:**

- We have not created a task list. **STOP** and create a list
- We have a task list! **CONTINUE** to the most important part of the meeting....

**>>>> delegate responsibility for each task <<<<**

## Task - Title and Theme

The selection of a title and theme may reflect a new direction... How about a logo or picture to symbolize and focus attention on the theme of your workshop? This logo can be included in all publications and publicity material to help people quickly identify and associate them with your workshop.

## Task - Location

Contact all sites identified in your planning meeting to determine if they can accommodate the needs that were identified at the workshop planning meeting.

Things to consider when choosing a site include:

- costs for use of the site and what is included in the price. (Some places are known to charge for everything, including water.)
- size of the workshop being planned and suitability of space being considered
- geographical location in relation to that of the potential workshop participants
- availability of parking
- availability of over night accommodation for participants
- access for people with disabilities
- food, refreshments for breaks, catering needs
- facilities the site can provide, such as audio visual equipment, lecture rooms, areas for exhibits, catering, phone lines for telephones, computers, internet
- equipment you need and whether you or the workshop center will provide it
- experts you may need to handle requirements for lighting, audio, or visuals and whether the workshop center will provide them
- timing and responsibility for setting up and dismantling displays
- time allowed by the site to set up and pack up before and after the workshop
- business hours and contact information for the site
- environmental considerations, such as use of polystyrene cups.

Be prepared to present the list of possibilities to the workshop planning committee as soon as possible so a site selection can be made.

## Task - Curriculum

Contact all

### Planning

1. Choose workshop materials to be presented. (Curriculum from GBOD, Speaker's Choice, Other)
2. Decide style of event: (Church, Dinner Theatre, Boardroom, Classroom)
3. Decide on appropriate length and course credits (1/2 day, full day, overnight, multiple days or evenings)
4. Establish the timing. (Morning, Afternoon, Evening)
5. Identify the potential attendees? (Beginners, Advanced)
6. Create a list of preferred presenters (Clergy, Community Based, Expertise)
7. Agree on food and eating arrangements. (Refreshments, Buffet, Seated Meals)

## Publicity and Avertising

The person in charge of publicizingt the workshop is responsible for arranging advertising and providing the media with information (via media releases). Advertising may include mailouts to individuals and other organizations. Don't forget to let your regional vice-president know as soon as you have a location and date set and a contact person. Most workshops now post information on a web site, and many of these sites allow for online registration. A due date that allows enough time for workshop organizers to complete the program should be included in all promotional material. A press release can be issued closer to the workshop date.

## Budget

In cases where an annual event is being planned, a budget from the previous year may be a helpful guide when allocating funds for the workshop.

### **Costs to consider when planning the budget include:**

- the site, what it includes, what you may need to add
- food and catering services that are needed for the workshop
- amount of any scholarships to be offered
- costs associated with keynote speakers and presenters
- expense of audiovisual or other equipment not supplied by the workshop site
- gifts for host site or special guests
- publications and promotional materials

### **The basic budget should include:**

#### **Income**

- all sources from which revenue may come - workshop registration fees, sponsorships (donations and cash)

#### **Expenses**

- printing and distribution costs for publications
- committee expenses
- promotional expenses
- keynote speaker and/or presenter honorariums
- site cost
- rental of additional equipment (projectors, cameras, etc.)
- meals, snacks, refreshments

## **Program and/or Agenda**

A draft program should be prepared, outlining the general timetable for the workshop. This timetable should take into consideration the availability, and suitability for your activities, of different facilities at the workshop site. Be sure to include time for registration and opening remarks. Most presenters don't like to be interrupted for announcements or details that should be covered before or after their presentation. Depending on the number of participants that are expected, it may be useful to have timeslots that vary in length or the flexibility to allow for double sessions.

Scheduling of meal breaks and other events should be included, such as remarks from a keynote speaker or special guest. Keynote speakers' presentations are often held in the morning of a workshop day and act as a focus for the day's activities. Also include time in the program for participants to browse through poster and/or book displays (this may be allowed for during the time allocated for meal breaks).

As more information becomes available, the program can be updated.

## **Keynote speakers**

A widely known and respected keynote speaker can greatly enhance the attendance at your workshop. This aspect of the workshop may also come with a significant cost. If you decide to have a keynote presenter, be sure you are aware of the presenters' requirements well in advance of their presentation so that you can provide any extra equipment.

## **Workshop presenter**

Definite arrangements with the presenter of the workshop should be made very early in the process. Be sure to maintain contact with them up to the day of the workshop. Contacts can be made via e-mail, phone, and snail mail. Consider what you will do if a presenter must cancel at the last minute.

## **Bags, Folders or other workshop handouts**

Bags have the advantage of both providing participants with a memento that will act as an ongoing advertisement for future workshops and as a bag keep all the workshop material and sponsored fliers together. The cost of the bags may be covered by one or more sponsors, in return for publicity, such as logos being printed on the satchel. Other forms of workshop packages include folders, sample bags, and publications that contain material relevant to the workshop.

## **Transportation and accommodations**

A committee member will need to be responsible for organizing any needed

transportation and lodging. Things to consider include:

- the need for a range of lodging, from cheap to expensive
- whether speakers or out-of-state guests need transportation
- proximity of food and other facilities to workshop accommodation

## Administration during the workshop

A number of different administrative tasks will need to be performed during the course of the workshop. These will include:

- movement of participants to and from different workshops, presentations or meetings
- provision of adequate equipment to presenters
- provision of up to date information to participants, particularly regarding any changes to the workshop program
- liaison with workshop site staff to keep things running smoothly.

It is a good idea to ensure that someone is available at all times in a central location, such as at the registration desk, to coordinate activities and attend to any problems that may arise.

## Catering and social activities

Some workshop sites allow outside catering; others do not. This may influence your choice of sites. If you are happy to use the workshop venue's caterers then you may simply need to choose a menu, provide the caterers with the numbers that will be attending your workshop, and the times you want to schedule morning and afternoon tea and lunch breaks. Choosing a site that can offer you many different services will probably cost you a little bit more than if you organize these things yourself; on the other hand, it may not be worth the extra time and effort.

Social activities are an important aspect of every workshop, as they provide a valuable opportunity for networking. Social events can include informal activities, such as barbecues; or more formal events, such as workshop dinners and breakfasts with guest speakers.

## Registration

All publications and registration forms should include the contact details of the person responsible for registration, so that workshop participants can correspond directly with this person. Copies of the workshop program should be sent out to allow participants to schedule different sessions and workshops. This should be done as early as possible (send a draft if the program is not finalized). This can also generate more interest in your workshop.

Create a database of registrations. Use the database to generate nametags for participants and to ensure that all participants receive the appropriate materials. At the workshop, be sure there is a registration table with a list of workshop participants and the relevant nametags and handouts. Allow for extra people to register on the day of the workshop who will need workshop material, such as bags, nametags and programs.

# Evaluation

Evaluation is important to gauge the success of each session and the overall success of the workshop. This is usually done using a survey through forms that can quickly be filled out at the end of each workshop session or at the end of the entire workshop. This evaluation is helpful for the persons responsible for the planning of future

# Event Day

1. Labels and name badges: Pinned or clipped onto board - alphabetically organized by department or category. Prepare spare badges and pens for additional arrivals.
2. Publicity material: Prepare brochures, flyers, banners and general info to display if required.
3. Display equipment: Prepare or plan for display boards, tables, chairs for publicity material & name badges
4. Additional A/V Equipment Check A/V Equipment (laptop, projector etc to ensure all cables, leads, lap top, screen, microphone, mouse are present)
5. Communication with attendees: Ensure all planners/staff know the following- Venue location and directions. Date & timing. Dress code, bathroom and telephone locations. Who the main point of contact is for general information. Itinerary of the Day or week. What are the Expectations of Attendees? Will they be met?
6. Prepare miscellaneous items to bring: Pens, Pads, Equipment, Documents, Presentation, Badges, Extra equipment, Business Cards, Name Badges, Printed Handouts of Material that will be covered etc
7. At Venue - Check for the following: Signage, Registration Desks, Name Badge, Boardroom Location of Meeting, Room Number, Number of Chairs, Flipchart & Pens A/V Equipment / Presentation Notepads / Pens. Make sure water is available. Refreshment area, snacks, Food Timing and Placement. Location to eat.
8. Have Fun! Relax. Everything Will Hopefully Work Out Fine.