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THE WORKSHOP PLANNER

(The A - Z of Workshop Planning)

by

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ACQUISITIONS

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- Gwen T. Winterberger

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INTRODUCTION

Volunteerism is a moving and growing force in society today, involving millions of caring individuals who provide noncompensatory human services to diversified agencies and communities at local, state, and national levels. Volunteers in the U.S. today number in excess of thirty-seven million people over the age of thirteen years.

Volunteers participating in diverse human service programs bring to the field varied disciplines of psychology, sociology, business, education, and social work.

Supply would appear to be in a most comfortable statistical position. Let's look at demand. At today's escalated consumer rate, can we afford the luxury of complacency? Daily, unique societal problems arise which produce a market of unique consumers requiring unique services. The awesome responsibility for maintaining this supply and demand balance in delivery of human services substantially rests with volunteer leadership. To what system and to which methods and techniques can leadership refer for assistance in meeting this challenge?

Training and workshops have proved effective instruments for nurturing volunteer/staff interaction and expertise. The workshop has become an increasingly important vehicle for defining philosophies, information exchange, problem solving, and planning strategies.

The A-Z manual is designed as a guide reference for the novice (individual, program, or agency) involved in the workshop planning process. Sample charts and forms included can be adapted to the planner's particular situation.

G.T.W.

March 1976

A is for assessment

Assessing needs of constituents should be the first pre-planning step taken, if there is an indicator of requirement for a workshop. A survey designed with clarity, brevity, and legibility will provide feedback in a relatively inexpensive manner and minimum time. A cover letter should accompany any survey explaining purpose, explicit directions for completion, a due date, and a self-addressed, stamped return envelope. Always address to a specific person rather than a position (for example, Ms. Betty Smith, Director). This can be the most profitable investment of the planner's time and energy.

Identifying the target group may be accomplished by various methods. (1) Staff may provide input regarding needs, trends, and new developments ascertained from field observations. (2) Ongoing assessment of other conferences offers pertinent information when screened for new areas of interest expressed by participants, themes, and objectives. A screening system can also signify subject areas benefiting from follow-up, added emphasis, new participative methods, and methodologies receiving best response from workshop members. (3) Evaluation summaries and current correspondence files can yield important data.

SURVEY FORM

NAME _____
 ADDRESS _____ PHONE () _____
 _____ ZIP _____
 ORGANIZATION _____ POSITION _____

1. List three individual or organizational needs that could be addressed at a workshop.

a.
b.
c.

2. Which workshop length is most appropriate for you?

_____ one-day
 _____ two-day
 _____ three-day
 _____ four-day
 _____ five-day

3. Would a national workshop be beneficial to you?

_____ yes
 _____ no

4. Which month would be most convenient for you to attend a workshop?

January	July
February	August
March	September
April	October
May	November
June	December

5. Would you seriously consider attending a conference planned according to your selections above?

_____ yes
 _____ no

Comments: _____

SAMPLE FORM

The following is a sample survey to assess the educational needs of volunteer coordinators in order to best design a workshop to meet their needs.

Establishing objective of survey is of prime importance and should be the first step.

SURVEY OF WORKSHOP NEEDS FORM

POSITION _____ DATE _____
 ORGANIZATION _____ ADDRESS _____
 PHONE _____ YEARS WITH ORGANIZATION _____
 YEARS IN PRESENT POSITION _____

Please rate the following items using the scale below. Prioritize according to need.

1 2 3 4 5
 Least ← Needed Item → Most

Skills

☐ goal setting
☐ grants, funds
☐ evaluation
☐ interpersonal communication
☐ administration
☐ leadership
☐ motivation
☐ accounting
☐ marketing
☐ decision-making
☐ other (please list)

Topics in Volunteerism

☐ matching volunteers with clients
☐ non-traditional involvement
☐ victims/advocacy
☐ religious involvement
☐ rural program
☐ values, ethics, justification/volunteerism
☐ citizen participation
☐ boards
☐ other (please list)

Comments: Keep statements as brief as possible. Ask only for information that is necessary for your study. Use a numerical scale in order to best empirically evaluate results. Questionnaire should be short and simple to understand. Each question should include one concept.

b is for budget

Once the need for a conference workshop has been validated and major themes set from consumer feedback, the next points the planner must address are: financial feasibility and the most effective method for establishing a comparative registration fee.

A proposed budget MUST be the planner's initial step. The immediate value of a proposed budget is to serve as a guideline when estimating overall expenses. The delayed value is measurement against the actual budget drawn up when all conference expenses have been paid.

Organizational policies can relieve the planner from many obvious financial decisions and offer direction in program planning. Planner policies are equally important since time and cost are involved.

BASIC POLICY CHART	
ORGANIZATIONAL	PLANNER
*Faculty	Program Distribution
- Honoraria	- Printing
- Subsistence	Address Labels
- Transportation	Brochures
(air fare, parking,	Packet Material
land mileage)	Displays
Staff	- Phone
- Salaries	- Correspondence
- Secretarial Support	- Postage
- Per Diem Expenses	Bulk (3 weeks)
	1st Class Mail
Overhead	Conference Site
- Administrative	- Conference Meeting
Expenses	Rooms
- Occupancy	- Staff Meeting Rooms
- Supplies	- Gratuities, Tax,
- Copying Machine	Refreshments
	- 10% Miscellaneous
*This policy should indicate payment of actual expenses versus per diem.	

B IS FOR BUDGET (continued)

Do not overlook existing possibilities for supplemental funding!! Explore opportunities for obtaining scholarship monies for participants, or monetary assistance, based on topic, directly to your organization.

Sources for funding could be foundations, public and private sector, and local community agencies. Unless you have outside funding or can build the loss into agency funding--

REGISTRATION FEE

MULTIPLIED BY ESTIMATED ATTENDANCE

MUST EQUAL ESTIMATED WORKSHOP COSTS!

PROPOSED BUDGET FORM

(WORKSHOP)

(DATE)

Income Expected -

Number of Registrants @ \$000.00 tuition each \$00,000.00

Direct Costs -

Staff:

Workshop Director - 1/2 time for 3 mos. @ \$000.00 per mo. 000.00
Workshop Assistant - 1/4 time for 1 mo. @ \$000.00 per mo. 000.00

Consultants or Faculty: (Travel & Subsistence)

Consultant I - 3 days @ \$000.00 000.00
Consultant II - 1 day @ \$000.00 000.00
Consultant III - 1/2 day @ \$000.00 000.00

Total Direct Costs \$ 0000.00

Indirect Costs -

Postage \$ 000.00
Printing 000.00
Telephone 000.00
Supplies (Workshop) 000.00
Staff Expenses (On-site) 000.00
Petty Cash 000.00

Total Indirect Costs \$ 0000.00

Overage (profit) realized \$ 0000.00

Overhead/indirect costs may also be calculated at 36.6% of income expected.

SAMPLE FORM



What are the basic guidelines and where is the resource potential for making a decision on a workshop theme and content?

Analysis of assessment data compiled from surveys, staff input, and evaluation summaries from prior conferences are indicators of constituent needs.

1. All topics must support the main workshop goals and objectives.
2. Level of presentation must be compatible with participant profile of experience.
3. Plan an adequate timeframe for quality presentation and goal attainment.
4. Staff members, board members, and citizens serving on planning committees can contribute productive input.
5. Evaluate the competition. If a theme is being handled well by another organization, your staff has an expertise reserve--Tap it!

D is for Design

1. Display a diamond necklace in a cigar box? Ridiculous!! The value of the contents warrants packaging of higher quality. So it is with a well-planned workshop. You have expended time and labor to insure first-rate content. Don't dilute that content quality with second-rate design.
2. Your keynote address sets the mood and standard for the workshop. Select this speaker meticulously.
3. There are obviously some practical questions to be considered in scheduling:
 - a. Is the topic more ideally suited to a morning or an afternoon session?
 - b. Will the presentation be most effective with small or large groups?
 - c. How much participation is expected?
 - d. Is it relevant to workshop objectives?
 - e. Has sufficient interest in the subject been documented?
4. Now the planner's creativity can come into full play; the sky is the limit. Research new and effective methodologies. Do be daring and experiment with an interesting training technique. Don't be a copier: your ideas could well be valuable plasma to all workshops in the voluntary sector.
5. Variation is a challenge to all persons in workshop sponsorship. Standardization is a bore--especially for the planner.

E is for Evaluation

Evaluation is a measurement tool.

Determine the purpose:

What is it for?

Who will use it?

What is being measured? (objective, goals)

Be systematic in the evaluation process; however, design should be commensurate with standard organization operations, used to evaluate other programs and functions.

Methods for distribution and recalling completed returns of evaluation forms must be clearly defined at opening session on the final day of workshop. Assigning a specific staff member to monitor the evaluation process promotes a subtle aura of accountability to the sponsor which is ultimately beneficial. This staff member should pass out the evaluation forms to each participant at the beginning of the final session of the workshop. Completed evaluation forms should be handed in to the designated staff person upon leaving the meeting room.

Evaluation forms should be tabulated, analyzed, and a summary published for circulation to the workshop community, including staff and faculty, as well as attendees as promptly as possible.

Follow-up evaluation summary within six months to obtain implementation results.

Last--but not least--USE IN FUTURE PLANNING!!

WORKSHOP EVALUATION FORM

This form is for _____
(Workshop Title - Date)

We'd appreciate your candid comments on the workshop for our use in the continuous improvement of future workshops.

1. Workshop facilities and accommodations?
 2. Workshop length? (too long) (too short) (about right)
 3. Size and number attending? (too many) (too few) (about right)
 4. What topics or presentations were most useful to you?
 5. What topics or presentations were least useful to you?
 6. What topics or presentations were omitted or underemphasized, and you would have liked more on them?
 7. What topics or presentations were overemphasized and you could have done with less on them?
 8. How would you rate the workshop overall in terms of its usefulness and interest to you? (Circle one number)
- | | | | | | | | |
|------|---|------|---|------|---|-----------|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| poor | | fair | | good | | excellent | |
9. Any other comments you might care to make would be most appreciated. (Use other side of paper if you wish.)

Signature (optional) _____

SAMPLE FORM

F is for
Faculty

A current file of resource people at national, state, regional, and local levels can be invaluable when making faculty decisions. If such information is unavailable to you as a planner, you should assume responsibility for integrating this log into organization files.

Mailing a training assignment contract to faculty members who have agreed to participate in your workshop provides the planner the opportunity to request vitae, abstracts of presentations, pictures, or other materials to be used for workshop publicity. Arrangements for transportation, parking, lodging, meals, etc., should be handled immediately upon request of written faculty confirmation.

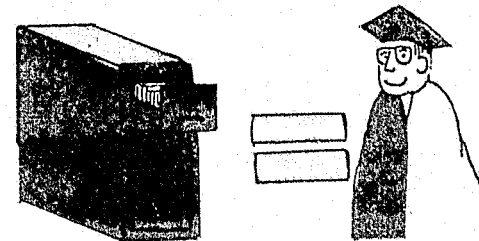
When possible, a coordinator chosen from sponsor's staff should be assigned to each faculty member. Coordinator's responsibilities are:

Procure special equipment supplies.

Check room arrangements for presentations.

Generally assist his/her assigned faculty member.

When the workshop closes there is a faculty acknowledgment to be mailed. If an evaluation summary is complete, send it along with your "thank you." Expense accounts submitted by faculty should receive prompt attention from sponsor organization.



FACULTY AGREEMENT FORM

NAME _____

TITLE _____

ADDRESS _____

(Zip) _____

WORKSHOP _____

DATE _____

LOCATION _____

HONORARIA _____

Reimbursement of round-trip travel via Y-class airfare _____

Reimbursement of housing and meals while participating in the workshop _____

Other _____

COMMENTS: Please complete the attached travel voucher for expenses only. Be sure to sign it in the lower right-hand corner. Receipts for airline travel must accompany the voucher. Payment will be made approximately two weeks following receipt of the voucher by the (organization).

Honoraria payment will be made approximately three weeks following the workshop.

SAMPLE FORM

WORKSHOP ASSIGNMENT FORM

To: (Faculty Member)

From: (Workshop Manager)

Subject: (Workshop Name, Address, Dates, etc.)

The program brochure is enclosed, red-checked where you are participating. It will be modified somewhat from advisory input, but if this materially alters your contribution, we'll advise you in good time. We hope it will give you at least the gist and thrust of the total program. If you have any questions or suggestions, please call us at () _____.

It's difficult to predict this far out, but we expect a minimum of (number) people, possibly up to (number).

We hope you can be with us for the entire program. In any event, we have your faculty assignments as follows: (Please let us know if we're wrong immediately.)

1. _____ Faculty Training Meeting.
(Comment: Very important for a last-minute program run-through, questions, and comments. Place to be announced at registration.)
2. _____ "Take a Consultant to Lunch."
(Comment: We can't guarantee anyone will want to see you for individual consultation, but the hope is that you can be around if they do.)
3. Time-Date-Title _____
(Comment: _____)
4. Time-Date-Title _____
(Comment: _____)

Additional Assignments and Comments:

We would appreciate having an outline of your presentation by (date).

PLEASE ACKNOWLEDGE RECEIPT OF THIS FORM IN WRITING.

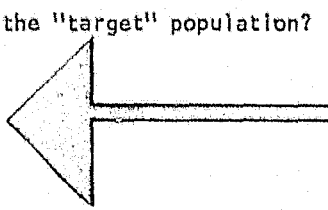
Again, thanks for your help.

(Workshop Manager, Organization, Address, etc.)

SAMPLE FORM

G^{is} for Goals

Established workshop goals and objectives should reinforce and support overall organizational goals and objectives. The questions listed below can be a simple guide:

- 
1. Do they accommodate the "target" population?
 2. Are they attainable?
 3. Are they measurable?
 4. Are they relevant?
 5. Is the timeframe adequate for realizations of goals?

H^{is} for Housing

Details to be considered when choosing a facility vary according to size and boundary limits of your workshop. If your workshop is to be local in nature, explore availability of space through such channels as churches, clubs, and public buildings. Book the facility one month in advance.

However, if you are sponsoring a workshop on a national scale (more than a one-day drive-in), a hotel will undoubtedly be your choice. Details are more complex, but an experienced hotel sales manager can be a valuable resource person. Book four months in advance. Request complete information regarding:

Contracts and prices of meeting and sleeping rooms.

Cut-off dates for bookings and penalties.

Acoustics, electrical systems, ventilation, noise level.

Transportation capabilities and information.

Parking.

Catering potential--coffee breaks, banquets, etc.

Accessibility to recreational and social facilities.

Billing policies.

Attitude regarding volunteerism.

Don't underestimate the importance of the last item. Volunteer misconceptions are still out there being perpetuated by lack of education regarding volunteerism philosophies and motives. If you don't verbalize and demonstrate volunteer professionalism, you run the risk

H IS FOR HOUSING (continued)

of a "do-gooder in a floppy flowered hat" or a "playboy millionaire relieving boredom by doing something good" judgment. This would have a negative effect on you, your participants, and the overall business transaction.

Periodic communication with hotel staff prior to workshop insures up-to-date information regarding hotel operations. (Major remodeling projects or changes in management could necessitate renegotiations.) One week prior to the workshop the planner should cross-check reservation lists with reservation desk personnel.

On-site at the workshop, one irrevocable rule must be respected: "One person in charge." The designated person from your organization discusses meeting room arrangements, reservation lists, service complaints, schedule changes, and answers financial questions directed to the host organization.

WORKSHOP SITE EVALUATION FORM

WORKSHOP TITLE _____

DATE _____

NUMBER ATTENDING _____

This evaluation is designed to create opportunities for hotel management and workshop sponsors to function as a team to provide optimum comfort and efficiency to their mutual client.

RESERVATION DESK

Pre-Workshop
Attendee Reactions
Rates
Parking
Transportation

FOOD SERVICE

Rates
Service
Suggestions

MEETING ROOMS

Size
Temperature
Appearance
Noise Factor
Lighting
Electrical Outlets
Furniture
Accessibility
Rates
Hotel Policies

CATERING

Room Set-ups
Service
Equipment
Rates
Hotel Policies

COFFEE SHOP

Rates
Service
Suggestions

GENERAL MANAGEMENT

Cooperation
Availability
Flexibility
Attitude

Reservation desk acknowledges block-off of (number) sleeping rooms for (workshop title) from (date to -).

Management at (hotel) confirms these meeting rooms (such as Room 210, East Room) (date to -).

- 1.
- 2.
- 3.

Catering service at (hotel) confirms the following services to be provided the specified times listed below:

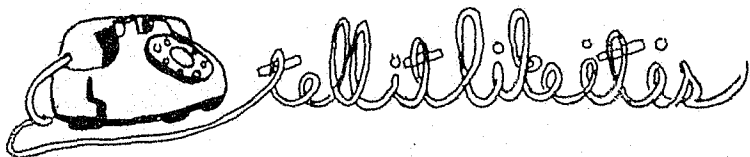
- 1.
- 2.
- 3.

SAMPLE FORM

i is for information

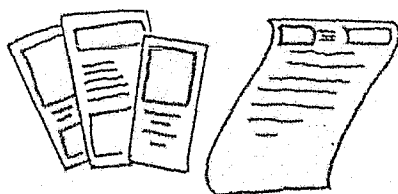
This applies to any advance publicity, cover letters, brochures, or pre-workshop homework sent to the target population of any workshop your organization sponsors.

TELL IT LIKE IT IS!



It is the only way to go on limited budgets with prices for printing, postage, and telephone costs escalating continually.

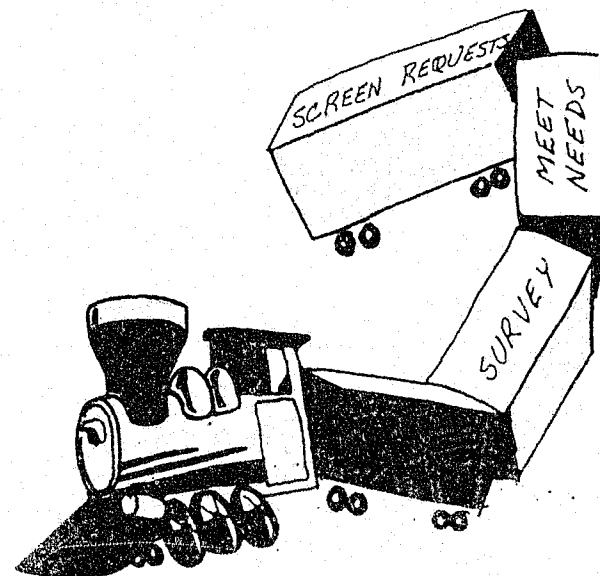
EARLY
ONCE
CLEARLY



i is for Justification

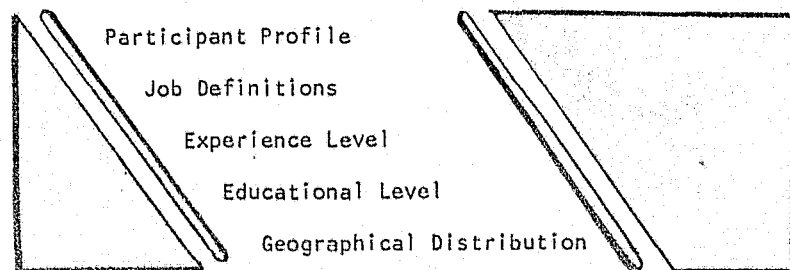
Justification is necessary to sponsor any workshop/conference.

You are on track if you:



K is for Knowledge

The planner's advance information enhances effectiveness of the workshop and plays an important part in goal accomplishment. Participants' inquiries or correspondence when tabulated and interpreted objectively can provide planners with the following components for planning purposes:



L is for Logistics

Examples are interspersed throughout this publication in calculable proportion. Attempting to present an overall logistical outline would be repetitious and not representative of your particular situation.

(Note: No matter how much you read, and plan, and seek advice, you will always have to learn some things the hard way. Early and thorough planning can keep these lessons from becoming disasters.)

Logistics are the lifeblood of any planning exercise; however, breakdown possibilities (logistical--not yours!) deserve acute recognition.

This IS insurance against disaster in workshop planning. It is called ALTERNATE PLAN. Buy into it!

Variables affecting workshop logistics are innumerable. For example:

TRANSPORTATION	ASSESSMENT
WEATHER	SUPPLIES
SCHOLARSHIPS	ECONOMY
LENGTH OF WORKSHOP	GEOGRAPHICAL LOCATION
HOUSING	EQUIPMENT AVAILABILITY
PARTICIPANT PROFILE	ACCREDITATION
SOCIAL FUNCTIONS	PROGRAM CONFLICTS
PEOPLE POWER	HOLIDAYS
FUNDING	RELIGIONS
REPUTATION	SEASON
AGE GROUP	PUBLICITY
ACCESSIBILITY	CONSUMER NEEDS
FACULTY	STRIKES
HONORARIUM	SURVEY
RECREATION	FEES
ENROLLMENT LIMIT	. . . and the FLU

Channels for publicizing an upcoming workshop should include an updated mass mailing selected from your organization files for the specific topic area; brochures or flyers provided to staff members when traveling in the field; complete workshop information to editors of local, regional, and national newsletters (six months in advance); and contact with agency directors regarding attendance of the agency personnel.

To extend workshop publicity, periodically ask staff to mention the coming workshop in their contacts by phone, correspondence, and personal interviews.

All circulated workshop information should be complete as soon as possible and ample lead time allowed for participants' planning. Be rigid about cutoff dates and criteria if this is written into the enrollment policy.

Expensive brochures can never compensate for informational deficiency and can be a decided "turn-off" when most budgets are severely strained.

WORKSHOP BROCHURE AND REGISTRATION FORM

The variations are limitless, but should always meet the particular needs of your organization. Below is a suggestion for a relatively simple arrangement which allows the recipient to tear off the fourth quarter of the brochure, drop it in the mail immediately, leaving him/her all the pertinent information on the workshop.

Using a good quality paper, 8-1/2" x 14", fold paper in half and then in quarters. This gives you a brochure 3-1/2" x 8-1/2", with each quarter fold containing the following information:

#1 - WORKSHOP (name)

DATE
PURPOSE
GOALS
TOPICS

#3 - FACULTY

FULL NAMES
TITLES
ORGANIZATIONS
BRIEF ABOUT EACH (as space permits)

#4 (cont'd)

RETURN THIS FORM AND YOUR
CHECK NO LATER THAN _____

WORKSHOP MANAGER
ORGANIZATION
FULL ADDRESS
PHONE NO.

#2 - GENERAL INFORMATION

WHERE
WHEN
STARTS
ENDS

Use dotted line between #3 and #4

#4 - REGISTRATION FORM

WORKSHOP (name)
WORKSHOP SITE

#5 - (reverse of #4)

Center return address (WORKSHOP MANAGER, ORGANIZATION, FULL ADDRESS) the long way on the page so registration form can be torn off and mailed promptly.

PRE-REGISTRATION
DATES
AMOUNT OF DEPOSIT

NAME
POSITION
PHONE
AGENCY
ADDRESS, ZIP

FEES

TYPE OF VOLUNTEER PROGRAM/AGENCY

CANCELLATION POLICY

HOUSING & TRANSPORTATION

TOPICS I WOULD LIKE TO HAVE
EMPHASIZED

REGISTRATION
TIME & DATE
WHERE

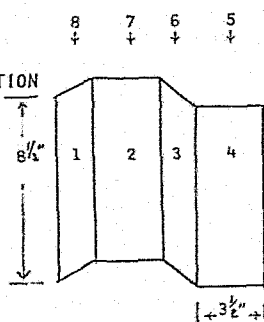
1.
2.
3.

ENCLOSED IS \$ _____ REGISTRATION FEE
or
I WILL PAY ON ARRIVAL

#6 - (reverse of #3) - Use for
overflow information, tours,
etc.)

#7 - (reverse of #2) - Use for
address label to possible
conferee.

#8 - (reverse of #1) - This is
the "front page" announcing
the workshop, dates, etc.,
showing logo, etc.



SAMPLE FORM

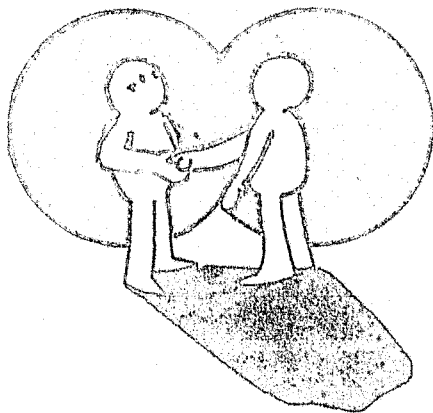
Nothing New

The workshop is an opportunity for making new friends, sharing new concepts, learning new techniques, and exchanging new information.

There is a mandate for new modalities, new tools, and new strategies from the new workshop constituents. They are a new breed of active participants, bringing to the group new issues, new experiences, new approaches to problems, and new solutions.

The planner who engages in old methods can never meet for day's challenge. Can one, then, assume that the overall workshop management system is in need of revitalization, new blood? Fulfilling for new educational opportunities and training programs in this particular field would expand the delivery of workshop management services through-out the voluntary sector.

This is not an attempt to discredit existing traditions associated with workshop attendance. It will, hopefully, always be a setting for sharing old friends, relationships, and memories.



Overhead Costs



P is for Planning

Charts, checklists, and lead time are three prerequisites to sound workshop planning. Each director performs in a unique situation, hence, lead time is a variable.

Posted time-plan charts serve a dual purpose: (1) Ongoing memoranda of the planning process for entire staff, and (2) visibility of deadlines minimize need for continual staff supervision.

Posted assignment charts (including faculty, staff, or volunteer support) with pertinent updated information provides sponsoring members an opportunity to conceptualize the on-site situation. This visual overview of staffing pattern may then be modified for improved design.

Any group decision formulated in the workshop planning process should be an essential entry on chart or checklist maintained by workshop planner.

No novice should launch into workshop planning without three checklists. These checklists should be self-developed. Any forms, charts, contracts, etc., designed by you are relative to your organization, location, and size.

POSTING IS VISUAL PLANNING

VISUAL PLANNING IS COOPERATIVE PLANNING

COOPERATIVE PLANNING PRODUCES A SUCCESSFUL WORKSHOP

SAMPLE CHECKLISTS

PLANNING

- ☐ Facility
 - ☐ Booking
 - ☐ Contracts
 - ☐ House Policies
- ☐ Faculty
- ☐ Proposed Budget
- ☐ Staff Planning
- ☐ Transportation
- ☐ Publicity
- ☐ Marketing
- ☐ Design
- ☐ Displays
- ☐ Alternate Plans

CONDUCTING

- ☐ Registration
- ☐ Welcome
- ☐ Special Events
- ☐ Opening
- ☐ Displays
- ☐ Day-by-day Logistics
- ☐ Delegate Tasks
- ☐ Mandatory Staff Meetings
- ☐ Mandatory Staff With Faculty Meeting
- ☐ Ongoing Assessment

POST-WORKSHOP

- ☐ Evaluation
- ☐ Acknowledgments
- ☐ Finalize Budget
- ☐ Reimbursements
- ☐ Conference Report
- ☐ Evaluation Summary

WORKSHOP TIMETABLE FORM

WORKSHOP TITLE _____ LEVEL _____

DATES _____ PREREQUISITES _____

LOCATION _____ CAPACITY MINIMUM _____ MAXIMUM _____

PLANNING ACTIVITIES	6 mos prior	4 mos	3 mos	6 wks	4 wks	2 wks	1 wk	post
Develop preliminary program	_____							
Budget (projected)	_____							
Contact faculty/request Abstract	_____							
Assemble mailing list	_____							
Brochures designed and sent to printer	_____							
Research funding	_____							
Brochures bulk mailed		_____						
Reserve all rooms for workshop			_____					
Certificates ordered				_____				
Confirmation of faculty				_____				
Packet materials/order				_____				
Faculty presentation abstract due				_____				
Audio-visual requests				_____				
Final program				_____				
Evaluation forms ready					_____			
Room set-up requested					_____			
Catering services ordered					_____			
Audio-visual equipment reserved					_____			
Registration deadline					_____			
Check workshop facilities					_____			
Name tags						_____		
Roster (rough draft)						_____		
Display material assembled						_____		
Staff assignments posted						_____		
Audio-visual equipment confirmed							_____	
Confirm all arrangements at workshop facility							_____	
Assemble workshop packets							_____	
Post workshop correspondence								_____
Finalize budget								_____
Final workshop report								_____
Faculty acknowledgments								_____

SAMPLE FORM

Questions anyone?

ASK THEM: easy ones, difficult ones, open-ended, multiple choice . . .

whatever it takes to give you a solid base for planning purposes.

ASK: Potential attendees, participants, staff--and yourself

Who needs a workshop? Where are they? How many?

What needs will a workshop meet? For whom?

Where should it be held? When should it be held?

Why should it be held?

R is for Registration

Share demographics with entire staff by posting a registration flow chart (attendee's full name and state).

Color-coding is an invaluable tool (possibly color dots):

On the registration card color-coding provides planner with at-a-glance information:

- (green) - Reservation made
- (red) - Reservation paid
- (blue) - Member (discount)

On name tags color-coding serves as a tool for pre-designed selection process to insure group balance.

Actual registration desk procedure will be modeled by the planner's decisions. The method allowing the most freedom and maximum time to acquaint the sponsoring staff with the participants should be adopted.

Registration Desk Procedure - Realize the actual process for what it really is . . . an atmosphere control. A congenial, comfortable processing is assured if these basic steps are practiced.

Preprinted Name Tags

Prelabeled Packets

Cash in Suitable Quantity & Denominations

Necessary Records

Participant Profile Review

Punctuality

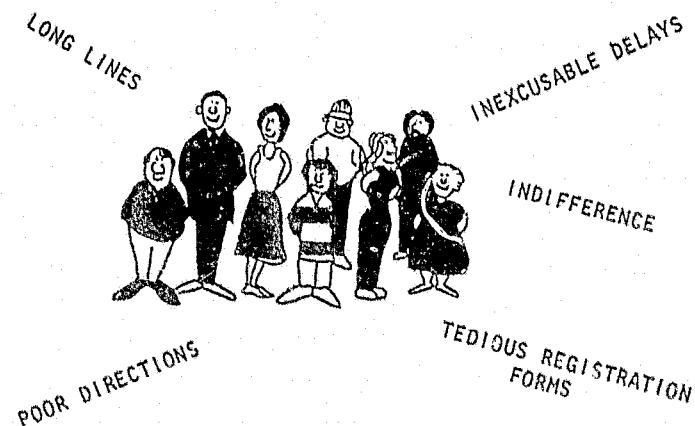
A display at, on or near the registration desk should be prominent and effective in reflecting the capabilities and services of your organization.

Request that participants verify or correct information on their registration cards. It is your guarantee for

R IS FOR REGISTRATION (continued)

an accurate workshop roster to be distributed to workshop members before conclusion of the workshop.

A thought - Don't be an extension of a possible fatiguing trip for the participant by poor registration desk planning or management.



S Staff members

The workshop planner has set the stage. Now success of the production is effected by staff performance.

Staff meetings must be mandatory all through the course of the actual workshop, primarily for assessment purposes and as ongoing evaluation. The staff meetings are also a vehicle for team decisions regarding program modification or time-frame adjustments.

The workshop director has the responsibility for clear definition of roles and lines of authority to all staff members throughout the workshop.

Staff must have conscientious awareness and sensitivity to the participants' expectations of them. These expectations may vary with topic and issue interest, but some qualifications are constant:

1. National Perspective
2. Expertise
3. Professionalism

POLICY ON STAFF ATTENDANCE AT WORKSHOPS

Mandatory core staff attendance-

- Core staff members will vary with each workshop and will be listed on pre-workshop assignment sheet
- Necessary time to perform duties posted on assignment sheet
- On-site workshop staff meetings
- Workshop opening and/or staff introductions
- Workshop faculty meeting
- Workshop wrap-up

Optional regular staff attendance-

- Professional attitudes should influence each staff member's judgmental decision when considering importance of individual attendance at the above

Marketing opportunities-

- Presenting, selling, and value reinforcement of any service your organization can provide
- Client development for special project, i.e., membership, educational opportunities

Organizational image-

- Awareness of necessity for individual presence
- Supporting the team concept necessary for successful workshop sponsorship
- Opportunities for social contacts valuable to individual or organization

In-Service Training-

- Attendance is recommended for staff members at workshop sessions
- Exposure to resource people in the field

Evaluation-

- Discussion for individuals regarding time commitments on assignment sheet is invited by workshop director
- Individual appraisal of optional attendance standards

STAFF EXPENDITURE RECEIPT FORM

Workshop		Dates		Location	
Transportation <input type="checkbox"/> To site <input type="checkbox"/> From site		<input type="checkbox"/> Lodging <input type="checkbox"/> Meals		<input type="checkbox"/> Per Diem	
Name of Payee	Address	Amount	Date	Signature/Payee	
Total Amount Rec'd	Payment has been made as acknowledged above, and reimbursement in the amount of \$_____ is claimed. Make check payable to: Name _____ Address _____				
Signature of individual authorized to pay advances at training site				Date	
_____ Director					
_____ Workshop Director					

Present Expenditure Receipt to Workshop Director

SAMPLE FORM

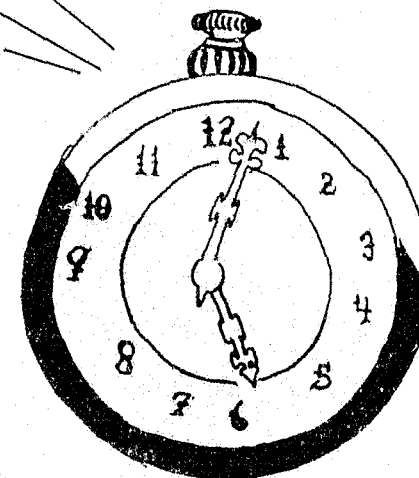
T Time Tables!

Make the first concession here and you have promised something you can't possibly deliver even though planning has met every other standard!

START ON

STAY ON

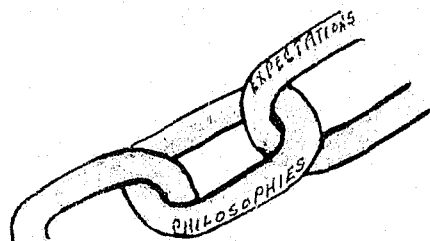
FINISH ON



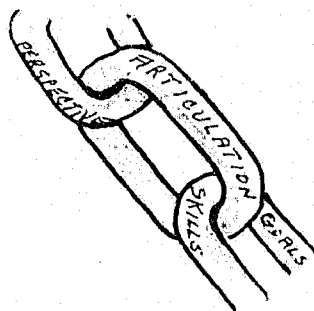
U is for Unity

Unity of purpose fosters attitudinal and behavioral unity.

Trainers, individually, have particular styles, techniques, and diversity of skills.



The link must encompass a unified purpose which requires smoothing out any kinks prior to final delivery of the product.



V is for Volunteers

Workshop planning seems to have extensive appeal in the volunteer community and, since administrative tasks are numerous, recruitment for volunteer assistance should be a serious consideration for the planner. Initiate this into the earliest planning time possible to allow uninterrupted training opportunity and insure continuity in the learning process for the volunteer. You may even wish to test a volunteer-team concept for "on-site" assistance.

If volunteers are available at the workshop site, they can provide information on community activities to interested participants. Historic tours, educational field trips, and shopping services are samples of extracurricular projects that would broaden the workshop scope for everyone involved.

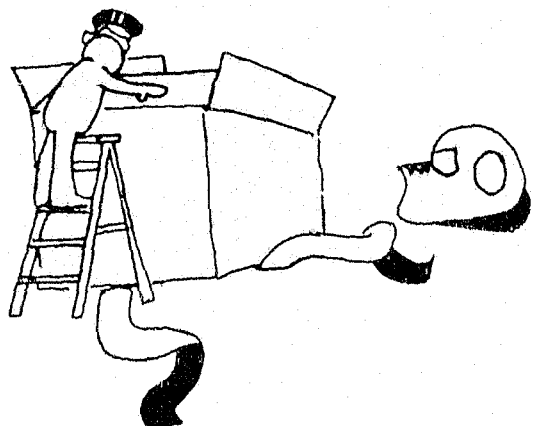
Challenge this same volunteer potential by assigning relevant and meaningful tasks to improve or expand workshop services.

W let's wrap it up

Every workshop should include this as a plenary session in the program design, but never propose it as an evaluation alternate. Time will be allocated to each participant if the group is small; conversely, earn a representative sampling from several small groups if the enrollment is substantial.

This candid workshop critique seems to develop most advantageously in a circle setting. A skilled facilitator leads off with a sample input and from this point it is a totally participant activity.

The wrap-up session dialogue should be included in the workshop report and evaluation, since it is a program design component.



WORKSHOP RECORDER REPORT SHEET

Notes:

1. The accuracy and sensitivity of your notes are crucial to the success of this workshop. Your recording will be valuable for: a) future workshop design; b) incorporation into an overall workshop report; c) input material at wrap-up session.
2. You can take notes in any form you wish during the session, but please convert them to this present format immediately at the end of the session.
3. Write clearly on this final report form, pressing pretty hard so the carbon is clear.

Workshop Title _____

Recorder's Name _____

Faculty Leaders _____

- A. What were the main problem areas or issues raised and what kinds of approaches to each were suggested?
- B. Even if it tends to repeat the previous: What were the main areas in which you felt you needed further knowledge, and briefly describe that knowledge?
- C. Even if it repeats some of the previous: What were the main points of consensus which tended to emerge?
- D. What were the main issues on which there was considerable disagreement?

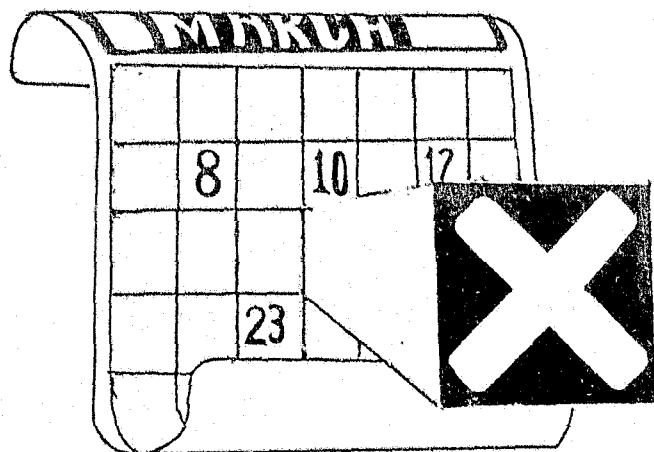
SAMPLE FORM

X marks the spot

It's on your calendar--it's opening day for your workshop. The move-out from the office location with necessary equipment and supplies to the workshop site should be systematic, assuming staff members are well informed of individual responsibilities.

Staffers have joined in a participatory "walk through" of the workshop one week prior to the scheduled opening, so all sponsoring members should be feeling confident, challenged, and hopefully saying to one another (having sponsored ??? workshops),

"THIS IS GOING TO BE THE BEST ONE YET!"



YOU:



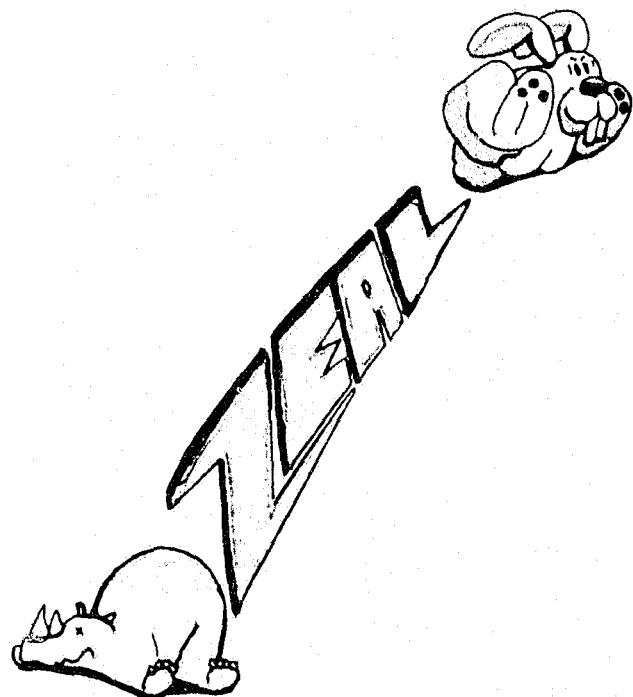
You will be subjected to diverse role, job, and skill definitions as workshop planner.

GLOSSARY

Pacesetter	=	Time Chart
Anxiety-Reducers	=	Checklists
Stabilizers	=	Organizational Skills
Reinforcers	=	Leadership/Staff
Clarifiers	=	Goals and Objectives
Enablers	=	Entire Staff
Challengers	=	Participant Community
Subscriber	=	Grantor, Funder
Scholar	=	Faculty
Procurer	=	Resource File
Reactors	=	Process Observers
Sycophant	=	"Yes" Man (person!)
Antagonist	=	Devil's Advocate
EVALUATOR	=	YOU, Staff, Attendees

Z put in that Zeal!

IT IS EASIER TO PLAN AND CONDUCT A WORKSHOP WITH IT THAN
WITHOUT IT!!!



NOTES:

END

7 11/25/1966