

PLANNING AND PRODUCING A WORKSHOP

Introduction:

One of an Interest Group's most important jobs is to plan and carry out continuing education workshops for members of the profession. Some small workshops can be held at Annual Conference, but the general press of business there precludes the effective transfer of much useful information. Many IG's have successfully presented workshops at other times and places. This document, the Workshop on Workshops Manual, combines best practices and explains how to put on a program, workshop, or event within the Washington Library Association.

Any successful event will require advance planning and consideration of the following:

1. **Needs Assessment:** The offering should be in response to expressed needs of the client group.
2. **Objectives:** There should be specific, measurable and/or observable learning objectives stated in one or more of the following areas: (1) changes in attitude and approach to the solution of problems; (2) acquisition of new knowledge or the revision of outdated knowledge in specific skills, techniques, and procedures.
3. **Design and Presentation:** When using an existing course, ask the presenter to provide the objectives, a schedule for the day, and any course materials. Check to be sure that these meet all of the criteria.
4. **Timeliness:** Program content and scheduling should be responsive to participant needs.
5. **Promotion:** The proposed publicity should be timely and comprehensive.
6. **Evaluation:** The program should be evaluated to determine how well the program met the planners' objectives, how well it met the objectives/expectations of the participants, and how to improve future programs.

Use this Workshop on Workshops Manual whenever your Interest Group is planning a program, event or workshop.

Table of Contents

- I. Program Planner Outline
- II. Timeline and Checklist
- III. WLA Continuing Education Procedures
 - Grant Application Form
 - Budget
 - Awards Notification
 - Funded Workshop Summary Sheet
- IV. Speakers
 - Sample contract
- V. Committees
- VI. Flyers and Advertising
 - Sample flyer
- VII. Registration
- VIII. Supplies and equipment
- IX. Evaluations

I. Program Planner Outline

1. **Identify target audience**
 - Needs assessment
 - Objectives
 - Define audience
2. **Identify appropriate locations/dates**
 - Call WLA Office or check WLA website for calendar of events and possible conflicts
 - Ensure that facility is ADA accessible
3. **Identify program leader/chairperson(s)**
 - Set up committees and meetings
4. **Reserve specific program site(s)**
 - Space requirements
 - ADA access
 - Equipment and technology support
 - Geographic access for intended audience
5. **Make financial arrangements**
 - Budget
 - Honoraria for presenters who are not WLA members
 - Expenses
 - Payment for expenses
6. **Design the program**
 - Theme
 - Format
 - Speaker(s)
 - Timeline
 - Content
7. **Publicity**
 - Design
 - Printing
 - Mailing
 - Signs at program
8. **Program details**
 - Agenda
 - Registration
 - Supplies/equipment
 - Speaker-contracts/handouts
9. **Program delivery**
 - Room set-up
 - Trouble-shooting
 - Evaluations
10. **Post program**
 - Clean up
 - Tabulate evaluations
 - Submit bills/receipts
 - Process vouchers
 - Send thank you notes

II. Timeline and Checklist

Timeline:

Once the needs assessment has been completed, the workshop goal, topic and speakers have been decided, calendars have been checked for conflicting events and the place and date has been determined, the chairperson(s) for the event may use this Timeline and Checklist to ensure that no details are omitted.

Committee members may be assigned to various parts of the timeline.

Establish goal dates working backwards from the date of the event. A good schedule is the basis of a well-planned workshop or program. If possible, a 6-month schedule works well but circumstances may dictate that a 9-month planning period is more appropriate given speakers' schedules and site availability. The timeline can generally be broken down into the following areas:

- 4-6 months: Planning (who, what, when, where, how), budget, and funding
- 3-4 months: Schedule, program, room equipment, food, handouts, and flyers
- 2-3 months: Design and printing, maps, check budget, speaker accommodations, and agenda, begin advertising event
- 1-2 months: Complete packets, other printing, review checklist
- 1-2 weeks: All confirmations completed, prepare nametags, food arrangements

Checklist:

Planning the Event:-

- Design budget
- Complete WLA CE grant request if funding is needed
- Investigate alternative sources of grant funds
- Contact speaker -discuss contract, printing of handouts, room set-up, and transportation, and accommodation, equipment needed
- Arrange for site and accommodations (confirm this close to the event)
- Confirm who is responsible for what -troubleshooting, speaker pickup, equipment, food, handouts, etc.
- Speaker and Facility Contracts -these must be cosigned by the WLA president if money is involved, so allow at least 6 weeks lead time (see sample contracts in speaker section)
- Schedule program content (e.g. entertainment, opening address, closing, evaluation)
- Discuss registration procedures with WLA office - establish fees, registration and refund policies
- Decide printing needs and who will print
- Design flyers, maps (see samples in Section 6)
- Advertise -determine what, when and to who to mail-labels and mailing assistance are available from the WLA office
- Book accommodation for speaker(s)
- Determine food, meal arrangements, and breaks
- Plan and prepare registration packets and handouts
- Arrange for interpreter or other ADA accommodation if required (WLA office will advise)
- Follow current financial reporting procedures (see next section)
- Decide room set-up, decorations, and lighting
- Signs -what, and who is going to print
- Organize display tables, membership information, and/or Interest Group exhibit - include WLA membership forms
- Get parking permits if necessary
- Print handouts, including Evaluation (see samples in Section 10)
- Check supplies list (see section 8)

Immediately Preceding the Event :

- Confirm who is responsible for what -make a list for each committee member
- Reconfirm program site and speakers
- Decide transportation needs and solutions
- Check equipment
- Confirm food and hospitality needs
- Organize cleanup crew

Day of Event:

- Pick up last minute food and supplies
- Arrive early
- Check set-up, supplies and equipment
- Set up registration area
- Meet speaker(s)
- Check room
- Start and end on time
- Reserve time for evaluations - distribute and collect
- Have fun, and keep your sense of humor!

After the Event:

- Send thank you notes to committee members and speakers
- Submit final evaluation and Workshop Summary Sheet to WLA office (registration figures will be provided by office staff)

III. Continuing Education Council Procedures

WLA Continuing Education grant application forms are available through the WLA web page, from the WLA Office, or from the Continuing Education Coordinator. Completed proposals may be mailed, faxed to the WLA Office or submitted via the WLA website.

The Continuing Education Council reviews proposals on an ongoing basis. Applicants will be notified in writing as to the status of their grant proposal.

If the proposal is approved, the CE Coordinator sends a copy of the Awards Notification form to the grant recipient and to the WLA Treasurer. A copy of the Project Financial Information form is included in the mailing to the grant recipient.

The recipient sends the completed Project Financial Information form to the WLA Treasurer.

The WLA President must sign all contracts. Send two copies of any contract, along with stamped addressed envelopes to the President for signature. The President can then forward the agreements and forms to the speaker or facility for signature. If there is a need for an IRS form, it will be sent to the speaker along with the President's signed contract, from the WLA Office.

All registration goes through the WLA office. Registration forms are part of the Association's financial records.

Checks are made payable to Washington Library Association.

Budget

You must do a budget for every workshop. Doing the budget will help you calculate the registration fees you will need to assess, and how many participants must register to make the workshop break even or make a profit. Items to consider include:

Honoraria

Speaker(s) -WLA members are not eligible to receive honoraria.
Panel members

Speaker Expenses

Travel – include air travel and/or mileage
Meals
Lodging
Handouts
Other expenses

Publicity

Flyers
Brochures
Posters
Press releases
Printing costs
Mailing costs
Paper costs, including envelopes
Signs
Tickets
Other

Supplies

Copying charges
Name tags - participants and speakers
Folders

Facility Charges

Parking
Meeting room or conference space
ADA Accomodation (per WLA office)

Telephone Charges

Long distance
Online hookup

Food

Refreshments
Meals
Breaks

Equipment

VCR
LCD Panel
Overhead Projector
Screens
Podium
Television
Microphone
Video or audiotapes
Computer set-up

WLA Continuing Education Grant Awards Notification

This form should be used when a grant is made from the WLA Continuing Education Fund to a WLA Interest Group or Committee. The Continuing Education Coordinator or designate will complete the form and send it, along with a copy of the grant proposal, to the WLA Treasurer. A copy of the form will also be sent to the Interest Group or Committee applying for the grant.

WLA Interest Group(s) or Committee(s)

Working title of workshop or project

Workshop date(s) and locations(s)

Amount requested \$ _____

Amount granted \$ _____

Minimum Registration (if applicable) _____

Cut off date (if applicable) _____

Comments:

Continuing Education Coordinator (or designate)

Date _____

Cc: WLA Treasurer

Applicant(s) (Interest Group or Committee)

WLA Project Financial Information

The Interest Group or Committee contact person for the project or workshop must complete this form and send it to the WLA Treasurer. Generally the person who completes this form is the person who applied for the Continuing Education Special Projects Grant.

WLA Interest Group(s) or Committee(s):

Working title of project or workshop:

Workshop date(s) and location(s):

Will any groups outside WLA be involved in sponsoring this workshop or project, or in sharing revenue and/or expenses? _____Yes _____No

If yes, please list group(s) and indicate nature of involvement:

Interest Group or Committee Chair signature: _____

Name of person authorized to sign vouchers to authorize payment of expenses related to workshop or project: _____

Signature: _____

Address: _____

Phone: _____ Fax: _____

Email: _____

IV. Speakers

Some pointers for a successful workshop or event in regards to your speaker(s);

1. Specifically outline your expectations for participants.
2. Discuss agenda and what you believe the participants' needs are likely to be.
3. Discuss contract, fees, cut-off registration timeline and numbers required (see sample contract).
4. Listen and discuss with speaker exactly what they have done in these areas.
5. Discuss all supplies, equipment, chair arrangements and other specific details. (including water), so nothing comes as a surprise.
6. Get a bio/picture for advertising, introductions.
7. Finalize an agenda.
8. Keep in touch closely as event nears.
9. Discuss transportation, meals, and handouts.
10. Have an alternate plan in mind -just in case.

Decide who will introduce the speaker and who will monitor the room during the presentation. Monitors will greet registrants, help with nametags, water and seating, allow latecomers in, and handle evaluations at the end of the program. The monitor will also keep an eye on heat and air in the room, and help with equipment set-up and troubleshooting.

Speakers – Sample Contract

<<Date>>

<<Name>>

<<Business>>

<<Address>>

<<City, State Zip>>

Dear <<Name>>

Thank you for agreeing to conduct a workshop(s) under the sponsorship of the << interest group name>> Interest Group of the Washington Library Association. This letter outlines our agreement regarding your presentation. Please review this agreement, and return one copy with your signature by <<date>> to verify your acceptance.

You will make the following presentation:

Program title:

Date(s):

Time: <<starting time – ending time>>

Location(s):

<<Interest group name>> and the Washington Library Association will provide:

Speaker's Fee:

Travel Expenses:

Meal per diem:

Photocopy costs:

Other:

NOTE: Include only those items listed here that have been budgeted for in the workshop CE Grant.

Either you or the OLA/WLA Joint Conference Committee may terminate this agreement without cause or liability up to 30 days prior to the program date by providing written notice. If <<number>> or more participants are registered by <<date>>, the <<Interest Group/WLA will be responsible for all expenses incurred by the presenter in preparation for the presentation and the presenter will be responsible for any

expenses incurred by the Conference Committee for the presentation. If less than <<number>> participants are registered by <<date>>, the <<Interest Group/WLA>> have sole discretion in extending the deadline or canceling the program.

This contract includes the right for the <<Interest Group/WLA>> to copy and distribute, without additional compensation, enough copies of your material, whether copyrighted or not, to meet the objectives of the program for which such materials are furnished. This agreement also allows for the right to take still photographs during your presentation that can be reprinted in print or electronic form. This contract does not allow for videotaping of any presentation unless otherwise stated within an agreement that provides additional compensation.

Thank you again for being a part of this exciting workshop. Please sign in the space provided to verify your acceptance of this contract. Fill out the attached form stating your presentation needs. Return the original signed contract and the form in the envelope provided. A copy of the contract is included for your records. Do not hesitate to call me at <<number>> if you have any questions.

Sincerely,

Workshop Coordinator

I accept the terms of this agreement:

_____ Date: _____

Signature of Program Provider

Taxpayer ID or Social Security Number _____

Signature of WLA President Date:

Original to WLA office/Copy to Treasurer

Note: Use only the parts of this form that you might reasonably be able to provide (this was prepared for conference speakers & may be more inclusive than we can be for a workshop. Do be sure that the last paragraph appears on whatever portion of this form you adapt. This does imply a contractual obligation on our part.

I will need the following equipment for my presentation:

___ power strip extension cord(s)

___ overhead projector

___ screen

___ slide projector

- VCR
- laptop computer equipped with PowerPoint
- monitor
- modem
- phone jack for computer hook-up
- computer projection unit
- internet connection

Other _____

Room Set-up Preference

- theater style
- classroom style (tables and chairs)
- speaker platform for ___-person panel
- podium
- table and ___ chairs on platform

Other _____

Microphone Set-up Preference

- microphone at podium
- hand-held microphone
- lapel microphone

Other _____

Additional needs: _____

The << Interest Group>> will make every effort to meet your requests for equipment and set up. If the Committee is unable to fulfill a request, the Committee will notify you as soon as every attempt to reasonably meet that request is exhausted. Any information provided on this form states your preferences and in no way is incorporated into the performance contract.

Gail E. Willis, Association Coordinator
Washington Library Association
4016 1st AVE NE
Seattle WA 98105-6502
(206) 545-1529 FAX (206) 545-1543
washla@wla.org <http://www.wla.org>

V. Committees

Arrange sub-committees to divide up the labor of planning and facilitating a workshop or continuing education event. The following is a brief list of tasks that committees can help with. All committees need to stay in close communication with the chairperson. Each committee may want to make its own timeline.

Program Coordination and Hosting:

- Identify, select, notify and confirm speakers
- Discuss purpose of event with speakers
- Get background information and photos of speakers
- Make travel arrangements for speakers
- Make room arrangements, ensuring that facility is ADA accessible
- Provide host or contact person for each speaker
- Identify who will introduce speakers and how they will be introduced.

Food, Hospitality, Facilities, Transportation:

- Plan transportation, parking
- Prepare supplies and equipment
- Plan room set-ups and display areas
- Arrange for podium, microphone, media support
- Plan and arrange food, decorations, entertainment
- Put together packet giveaways
- Clean up

Registration, Volunteers, Evaluation:

- Develop pool of volunteers
- Identify greeters and registrars
- Provide agendas to all
- Prepare nametags
- Coordinate mailings and refunds with WLA office
- Plan for volunteers at display tables
- Decide on evaluations, distribute and collate information

VI. Flyers and Advertising

Information that must be conveyed in your flyer --

- WLA logo -must be included on every flyer (WLA office can supply -leave space on flyer, consult with office personnel)
- Title of workshop or event
- Speaker(s), and information about speaker(s)
- Date, time, place (including address), telephone
- Learning objectives, or what participants will learn from the workshop
- Sponsor(s)
- Maps, directions, instructions for participants
- Parking information
- Registration fees – for WLA members, non-members, and students (if applicable). There must be a \$10 differential between WLA members and non-members and the phrase: “Discounted cost is a benefit of membership.”
- Include \$2 surcharge for ADA accommodation contingency fund
- Instructions for checks (“payable to Washington Library Association”)
- Instructions for purchase orders (“include Purchase Order Number”)
- Check if receipt required (“ ___-Yes ___ No”)
- Refund and cancellation policies
- “For more information call....”
- Registration form
- Return address for registration (all registration goes to WLA Office)
- Deadline (make this very clear)
- ADA Statement: e.g. "Reasonable accommodation for individuals with disabilities is available. Please indicate any ADA requirements on your registration form and return it by the registration deadline."

Steps to producing a flyer --

- Design flyer layout
- Edit speaker information
- Prepare draft copy
- Proofread
- Approve flyer for print. with WLA Office
- Send to WLA Office for printing and mailing (allow at least 8 weeks). Always consult with WLA office personnel regarding mailing lists and schedules.

Places to advertise --

- WLA Annual conference
- Other Association or Interest Group conferences or meetings
- Selected WLA interest groups and mailing lists -mailed through WLA office
- WLA Link -newsletter
- Listservs -WIIF, PNLA-L, WLA, WLMA
- Libraries in neighboring states (newsletters, listservs)
- WLA Homepage -contact Webmaster

Other Printing Requirements --

- Nametags
- Signs
- List of participants (obtained through WLA Office)
- Handouts
- Table information
- Maps (to location and to neighboring restaurants)
- Evaluation forms

Sample Registration Flyer for WLA Sponsored Workshop

(Include the WLA Logo on all flyers)

Title of Workshop:
Including subtitle if needed

Presented by: Speaker(s), information about speakers if needed

When: Date and time

Where: Location, including address and directions (separate map with directions can be on verso)

Cost: \$20 for WLA members -discounted cost is a benefit of personal membership
\$35 for non-members
\$15 for students
(registration fee includes \$2/day ADA surcharge)

Learning Objectives: (e.g. what will participants expect to learn?)

For additional information contact: Name of Contact
Address, Phone number, email address

Or WLA Office, 4016 1st Ave NE Seattle W A 98105-6502
(206) 545-1543 or 1-800-704-1529 (outside Seattle dialing area)
FAX (206) 545-1543 Email washla@wla.org

Registration: Workshop Title
Date, time, location

Name: _____ Work Address: _____
City: _____ State: ____ Zip _____ Day phone: _____
Email: _____

Check here if you need a receipt for your personal check Check # _____

Cost: WLA Member \$20 _____ Non-member \$35 _____

Please make checks payable to Washington Library Association

*Note: Purchase Orders must be accompanied by completed registration form. P. O. # _____
Date of P. O. _____*

and mail to: WLA by REGISTRATION DEADLINE: date
4016 1st Ave NE
Seattle W A 98105-6502

Reasonable accommodation for individuals with disabilities is available. Please contact the WLA office (545-1529 or 1-800-704-1529) by (insert date) if you require accommodation. revised 06/01/99

VII. Registration

All registration goes to the WLA Office. Include a deadline for registration on all flyers.

Day of Event -Registration area checklist--

- Table and chairs
- List of participants to check off (WLA office will provide)
- Copies of paid registration forms for those who indicated that they need a receipt
- Nametags
- Pens and pencils
- Notepads
- WLA membership information
- Information about upcoming workshops and events
- Keep a list of names and addresses of late registrants and submit to the WLA office after the event. Do not collect registration money on-site. The WLA Office will contact late registrants and collect the registration fee after the event.

Packet to handout to event participants

- Outline or agenda
- Learning objectives
- Evaluation form
- Food tickets (if necessary)
- Handouts

Identify the registration area with a sign if necessary. Remember to supply signage directing participants to the correct room or area if needed.

VIII. Supplies and Equipment

Supplies for participants and speakers:

- Pencils
- Tablets
- Folders
- Paper clips
- Notebooks
- Nametags
- Instructions

Prepared audiovisuals:

- Flip charts
- Posters
- Overheads
- Slides
- Computer generated visuals
- Videos
- Online visuals
- Audiotapes

Equipment:

- Overhead projector
- VCR
- Slide projector
- LCD panel
- Extra bulbs
- Screen
- Television
- Cameras
- Tape recorder
- Computer or laptop
- Extension cord

Miscellaneous:

- First Aid kit
- Water pitcher and glasses (or bottled water)
- Napkins
- Paper towels

Other room items to check:

- Location of heat/air
- Wastebaskets
- Electrical and telephone outlets
- Location of restrooms
- Location of fire exits
- Location of nearest telephone
- Copying facility if available
- ADA accessibility

IX. Evaluations and Follow-up

Evaluations: Workshop organizers are responsible for providing the CE and WLA Coordinators with an evaluation of the workshop no later than one month following the event.

Gathering information: Evaluations from participants provide essential information for planning future workshops, and may be gathered in several ways:

Participants complete Evaluation Form (see next page) - when using a written form, organizer must highlight and encourage having them returned to designated place before leaving workshop;

Organizer or presenter elicits verbal evaluations from participants using basic What went well? and What could have been improved? questions;

Organizer and/or selected individuals participating in workshop are designated evaluators, using Evaluation Form guidelines, and other questions unique to a given workshop that might best provide useful information.

Organizer elicits presenter s evaluation of event (through wrap-up conversation, follow-up e-mail, etc.)

Summarizing evaluations: Workshop organizer summarizes evaluation information gathered in a brief narrative that includes:

Were participant expectations and objectives met? (include numerical summaries if using Evaluation Form)

Did the presenter do well, and would you recommend her/him for other continuing education presentations?

How well was the event organized? (specific pluses/ minuses in key categories of needs assessment, workshop design, planning and timeline, promotion, logistics, are helpful)

Was the facility comfortable and accommodating for a successful event?

What were the most outstanding aspects of the workshop? What elements could be changed to improved such an event?

Statistical information is also part of the workshop evaluation, including numbers participating (use registration sheets) and financial summary (Conference Manual form).

**Washington Library Association
Continuing Education Committee**

Evaluation Form

Your comments on the program just completed will be used to improve the quality of future programs. Thank you for your input.

Please rate the following items on a scale of 1 to 5, with 5 being highest:

	Low		Medium		High
1. Clarity of instructional objectives	1	2	3	4	5
2. Relevance of this program to your needs	1	2	3	4	5
3. Organization of program	1	2	3	4	5
4. Quality of instruction	1	2	3	4	5
5. Quality of instructional materials	1	2	3	4	5
6. Overall rating of workshop	1	2	3	4	5

Were your expectations met?

Yes_____

No_____

Please explain:

The most useful aspect of this workshop/program / event was:

The least useful aspect of this workshop/program/event was:

Topic suggestions for future workshops/programs/events:

Additional comments (use back of form if necessary):

Thank you for completing and returning this questionnaire.

Notes: