

MICROCOPY RESOLUTION TEST CHART  
NATIONAL BUREAU OF STANDARDS 1963-A

DOCUMENT RESUME

ED 137 426

UD 016 728

AUTHOR Taylor, Alvin Leon  
 TITLE Workshops: The Educator's Manual for Coordinating the Complete Conference.  
 INSTITUTION Far West Lab. for Educational Research and Development, Berkeley, Calif.  
 SPONS AGENCY Office of Education (DHEW), Washington, D.C.  
 PUB DATE May 76  
 CONTRACT C-391-75-0005  
 NOTE 27p.

EDRS PRICE MF-\$0.83 HC-\$2.06 Plus Postage.  
 DESCRIPTORS Activities; \*Conferences; \*Evaluation; \*Manuals; \*Objectives; \*Planning Meetings; Program Coordination; Success Factors; Teacher Workshops; \*Workshops  
 IDENTIFIERS \*General Assistance Centers

ABSTRACT

This document is an educator's manual for coordinating a complete conference. It was developed under contract for a General Assistance Center under Public Law 88-352 Civil Rights Act of 1964 Title IV "Desegregation of Public Education Section 403 "Technical Assistance". The manual discusses the mechanics of planning a workshop and includes the following topics: objectives of the workshop, budget, attendance, convention bureaus, facility selection, content and scheduling, audio-visual equipment, and agenda. The mechanics of conducting the workshop are also discussed. These include the following topics: registration, the workshop, evaluation, adjournment, and follow-up activities. A list of characteristics of successful workshops is provided. (Author/AM)

\*\*\*\*\*  
 \* Documents acquired by ERIC include many informal unpublished \*  
 \* materials not available from other sources. ERIC makes every effort \*  
 \* to obtain the best copy available. Nevertheless, items of marginal \*  
 \* reproducibility are often encountered and this affects the quality \*  
 \* of the microfiche and hardcopy reproductions ERIC makes available \*  
 \* via the ERIC Document Reproduction Service (EDRS). EDRS is not \*  
 \* responsible for the quality of the original document. Reproductions \*  
 \* supplied by EDRS are the best that can be made from the original. \*  
 \*\*\*\*\*

ED 137426

# WORKSHOPS

THE EDUCATOR'S MANUAL

FOR

COORDINATING THE COMPLETE CONFERENCE

by

Alvin Leon Taylor

U.S. DEPARTMENT OF HEALTH,  
EDUCATION & WELFARE  
NATIONAL INSTITUTE OF  
EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY.

STRIDE—Service, Training, and Research in Desegregated Education  
Far West Laboratory for Educational Research & Development  
San Francisco, California 94103

0D016728

The activity which is the subject of this report was supported in whole or in part by the United States Office of Education, Department of Health, Education and Welfare. However, the opinions expressed herein do not necessarily reflect the position or policy of the United States Office of Education and no official endorsement by the United States Office of Education should be inferred.

The material reported herein was developed under contract C 391-75-0005.

FOR

A General Assistance Center  
Public Law 88-352 Civil Rights Act of 1964  
Title IV "Desegregation of Public Education"  
Section 403 "Technical Assistance"

Far West Laboratory for Educational Research  
and Development  
1855 Folsom Street  
San Francisco, California 94103

Dr. Leonard C. Beckum, Director

**M. Isabel Romo, Editor**

Copyright © 1976 Far West Laboratory for Educational Research and Development. Copyright for these materials is claimed only during the period of development and evaluation, unless authorization is granted by the United States Office of Education to also claim copyright on the final materials. For information on the status of copyright claim, contact the General Assistance Center.

May, 1976

**3**

All inquiries or requests for additional copies should be sent to:

**Dr. Leonard C. Beckum, Director**  
**STRIDE/General Assistance Center**  
**Far West Laboratory for Educational**  
**Research and Development**  
**1855 Folsom Street**  
**San Francisco, California 94103**

*But, Mousie, thou art no thy lane  
In proving foresight may be vain;  
The best laid schemes o' mice an' men  
Gang aft agley,  
An' lea'e us nought but grief an' pain,  
For promis'd joy.*

—BURNS, *To a Mouse*

## CONTENTS

PREFACE .....	vii
---------------	-----

PLANNING THE WORKSHOP .....	1
-----------------------------	---

Objectives	
Budget	
Attendees	
Convention Bureaus	
Facility Selection	
Content and Scheduling	
Audio-visual Equipment	
Agenda	

CONDUCTING THE WORKSHOP .....	13
-------------------------------	----

Registration	
The Workshop	
Evaluation	
Adjournment	
Follow-up Activities	

CHARACTERISTICS OF SUCCESSFUL WORKSHOPS .....	17
-----------------------------------------------	----

### FORMS

WORKSHOP BUDGET FORM .....	3
A-V AIDS CHECKLIST .....	10
REGISTRATION AIDS CHECKLIST .....	14
COORDINATOR'S CHECKLIST .....	18

## PREFACE

In the frenetic world in which we live there is a need to retire from the regular routine to a setting somewhat different than our normal environment to inform, challenge, reassess, reevaluate, elucidate and educate ourselves and our colleagues.

When representatives of STRIDE began informing school district personnel throughout California, Arizona and Nevada about the proposed STRIDE workshops and conferences, many responded unfavorably. "We've been workshopped to death," "We're tired of outside experts with their panaceas attempting to come in and tell us how to solve our problems," or "What makes you think your workshops will be different than all the other sessions to which we are invited?" were typical responses.

Believing that effective, creative workshops are a necessary and indispensable tool, STRIDE staff members began to develop a series of participatory workshops with specific goals and objectives for school districts throughout USOE/Region IX. Participants returned to their home districts and began requesting that similar staff training sessions be implemented within their districts where greater numbers of their personnel could take advantage of the sessions. From the regional workshops and conferences grew the STRIDE "miniworkshops."

In response to the numerous requests received by our staff for assistance in the development of inservice training sessions, STRIDE presents this manual to assist educators in the coordination of their conferences.

## PLANNING THE WORKSHOP

The educator who has coordinated a workshop where everything worked to perfection is probably aware of how fortunate he or she was. Some of our less fortunate colleagues have been involved in workshops where nothing seemed to go right. One might arrive at the workshop site and find the meeting room occupied by another group that is also scheduled for that time and place; or, that the morning meeting room is decorated with all the left over trash from the previous night's party. Perhaps the keynote speaker developed laryngitis the morning of the session; or, worse yet, neglected to call and state that he would be unable to attend the workshop. What happened when the caterer arrived at 1:30 p.m. with the luncheon that had been scheduled for noon?

This manual cannot provide a solution for every potential question or problem which might arise regarding workshops and conferences. However, it seeks to impress workshop planners that, if they would guard against last minute panic and problems, they must keep on top of the small details from start to finish.

### Objectives

If we are to successfully use the workshop as a tool, we must have specific, attainable objectives. They must be clear to the coordinator and his committee; the panelists, consultants and other staff members; and also to the attendees. These objectives must be communicated to all involved parties before the conference begins.

Vague objectives are a source of frustration and annoyance for participants in your conference. Without specific objectives it is impossible to know whether the task has been accomplished and to measure success or failure.

When objectives are not provided by administrators or others, the coordinator must assist in the formulation of clear-cut, viable meeting goals. This procedure can be initiated by asking a few simple questions. What changes are desired as a result of the conference? Should the attendees be more knowledgeable? Should they be more enthusiastic? Should their behavioral patterns, ideas or values be changed? Should new skills be taught?

It is not easy to attain the objectives developed from the above questions. It is very difficult—though not impossible—to effect behavioral change. However, when unambiguous workshop objectives have been established, one can begin to plan the development of the workshop around the people, materials, and facility that portend success. Extraneous issues can be deleted and the coordinator can concentrate on the purpose of the activity.

The objectives of the meeting should be dramatized in the workshop theme or slogan. The theme should be appealingly designed to create excitement about the meeting. It should be brief and easily remembered, direct and positive, and carefully chosen because of its role in reminding participants of the purpose of the conference.

### **Budget**

The objectives are primary, the budget is secondary and all other factors are tertiary in relation to them. If the conference is a financial "disaster," it will be difficult to convince anyone that the objectives have been met. The effective coordinator must plan the activity within the framework of the available and potential funds.

After some initial planning, it should not be difficult to prepare an estimated budget similar to the form on the opposite page. If the total funds available do not equal or exceed the total funds required, the workshop must either be adjusted or cancelled.

The budget cannot determine needs. It cannot determine objectives. However, it can influence the activities that are developed to meet needs and objectives. While no one likes to cancel a potential workshop, if funds cannot be raised to support the effort, and the workshop cannot be redesigned, the coordinator has no alternative.

Assuming that finding is not a problem, close attention must still be given to the budget. As estimated costs become actual costs the budget must be revised to provide accurate information for all concerned.

## WORKSHOP BUDGET FORM

**Funds Available**

- |                                 |          |                 |
|---------------------------------|----------|-----------------|
| 1. From Sponsoring Organization | \$ _____ |                 |
| 2. From Workshop Attendees      | _____    |                 |
| 3. From Other Sources           | _____    |                 |
| <b>Total Funds Available</b>    |          | <b>\$ _____</b> |

**Funds Required**

- |                                                |          |                 |
|------------------------------------------------|----------|-----------------|
| <b>1. Site or Facility Rental</b>              |          |                 |
| a. Rooms                                       | \$ _____ |                 |
| b. Taxes and Gratuities                        | _____    |                 |
| c. Other _____                                 | _____    |                 |
| <b>Total</b>                                   |          | <b>\$ _____</b> |
| <b>2. Meal Functions</b>                       |          |                 |
| a. Meals                                       | _____    |                 |
| b. Taxes and Gratuities                        | _____    |                 |
| c. Other _____                                 | _____    |                 |
| <b>Total</b>                                   |          | _____           |
| <b>3. Staff</b>                                |          |                 |
| a. Salary                                      | _____    |                 |
| b. Travel                                      | _____    |                 |
| c. Lodging                                     | _____    |                 |
| d. Per Diem                                    | _____    |                 |
| e. Other _____                                 | _____    |                 |
| <b>Total</b>                                   |          | _____           |
| <b>4. Consultants</b>                          |          |                 |
| a. Honorarium                                  | _____    |                 |
| b. Travel                                      | _____    |                 |
| c. Lodging                                     | _____    |                 |
| d. Per Diem                                    | _____    |                 |
| e. Other _____                                 | _____    |                 |
| <b>Total</b>                                   |          | _____           |
| <b>5. Audio-visual Equipment and Materials</b> |          |                 |
| a. _____                                       | _____    |                 |
| b. _____                                       | _____    |                 |
| c. _____                                       | _____    |                 |
| <b>Total</b>                                   |          | _____           |
| <b>6. Publicity</b>                            |          |                 |
| a. _____                                       | _____    |                 |
| b. _____                                       | _____    |                 |
| <b>Total</b>                                   |          | _____           |
| <b>7. Other Costs</b>                          |          |                 |
| a. _____                                       | _____    |                 |
| b. _____                                       | _____    |                 |
| c. _____                                       | _____    |                 |
| <b>Total</b>                                   |          | _____           |
| <b>Total Funds Required</b>                    |          | <b>\$ _____</b> |

## **Attendees**

Certain factors which tend to promote cohesion should be present among the attendees. These might be need, interest, concern or potential. Experience has shown that workshops are more successful when attendees are personally motivated and involved. If the outcomes of the conference will immediately impact their activities, attendees have much more at stake and consequently their participation will be at a higher level.

The workshop must be a challenge for the attendees. It should be compatible with their level of sophistication and awareness. Attendees should have some knowledge of the subject to be discussed and some experience in dealing with the issues concerned.

Assistance should be provided to attendees who wish to prepare for the conference by expanding their background and knowledge of the subject by a preconference study of germane issues in order to facilitate their participation in group discussions.

Workshops are usually much more successful when attendees participate voluntarily than when they are compelled to attend. The coordinator should attempt to determine in advance, whenever possible, whether attendance was mandatory or voluntary.

The conference planners must initiate communication with the potential attendees. This communication, which may be in the form of a brochure or letter, should include the objectives, location, dates and times, registration fee, and related benefits. If information is available concerning consultants, keynoters, or others who will be participating, it should be included also.

The timing of the initial communication is important. If notification is sent too early, the conference may be forgotten. If notification is sent too late, the potential attendees may have made other plans. Some conferences are scheduled years in advance because of logistical problems; however, this is an exception rather than the rule. Two or three months is normally sufficient lead time, but anything short of six weeks generally results in dissatisfaction.

Potential attendees should have the opportunity to provide feedback concerning the tentative agenda. Attendees who are allowed to participate in the planning and implementation of a workshop will have a vested interest in its success. It becomes "our conference" rather than "their conference."

Provision should be made to collect as much registration information as possible prior to the conference. Preregistration

allows the attendees to pick up their registration packets and materials swiftly without waiting in lines. It also allows the registrars and hosts to deal with other problems; and, consequently, the atmosphere around the registration table will be more relaxed and comfortable—contributing to the overall welcome.

### **Convention Bureaus**

Most cities have convention bureaus which are ready to provide valuable assistance to workshop coordinators. They assist planners in evaluating the availability and suitability of meeting sites; assist with disputes; and often provide name tags, program covers, and secretarial assistance with registration.

Other services include assistance with the arrangement of group tours to local points of interest; assistance with press releases, photography and publicity; and the provision of informational brochures.

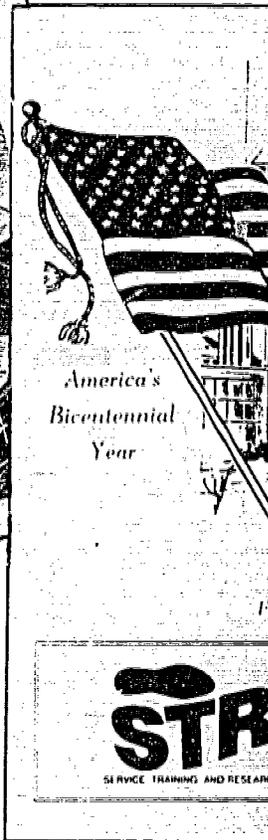
Convention bureaus usually operate on very small budgets. While they are ready to assist in the promotion of interest in your conference, their limited assets restrict the quantity of materials and the amount of service that they can provide.

### **Facility Selection**

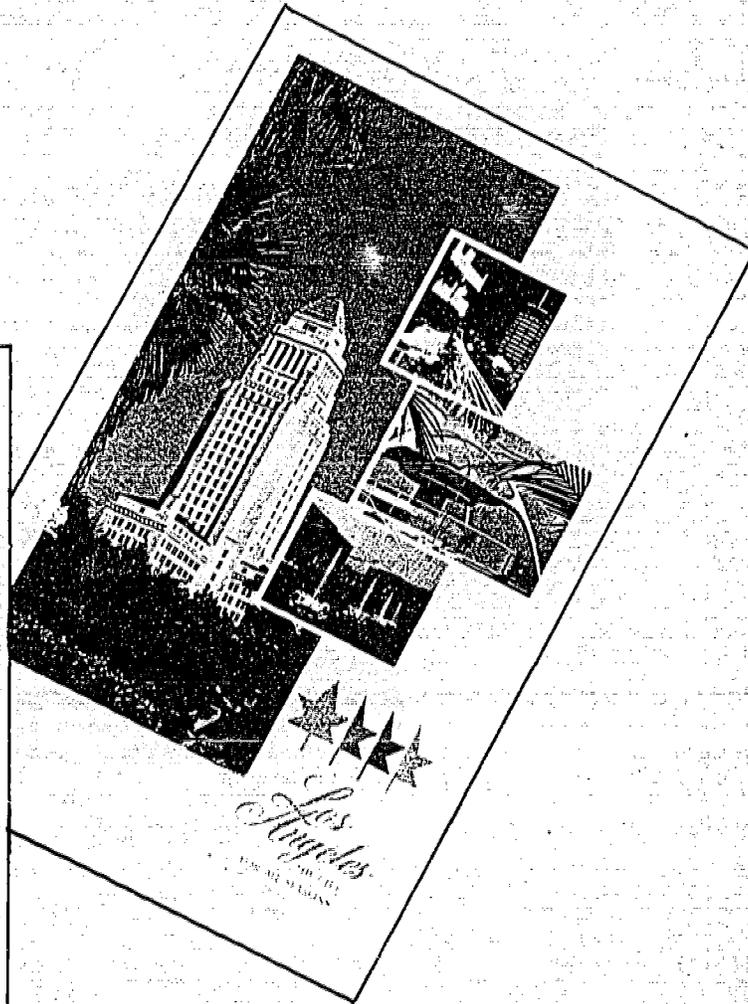
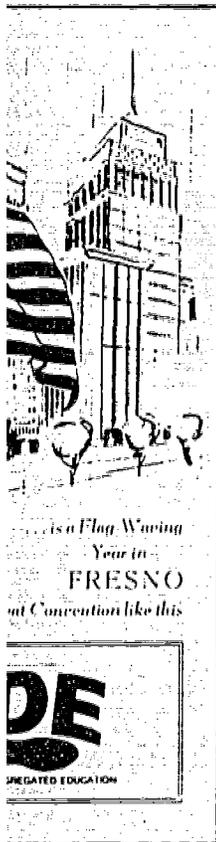
The selection of a suitable site is directly related to the success of the workshop. It should be luminous, properly ventilated, comfortable, free from noise and other distraction, and of proper size to accommodate the group. There are many potential sites: hotels, convention centers, churches, community centers, halls, school buildings. The coordinator must determine his or her needs and personally inspect the potential site. Should it appear to be inappropriate for the conference, an alternative location must be chosen.

If one has a very small budget, the choices of facilities are limited. However, if registration fees are to be charged, the selection of a plush hotel may stimulate interest in the workshop.

Large hotels are usually able to quickly adjust and effectively provide for last minute emergencies. Small hotels are frequently more courteous and friendly for they are more dependent upon your repeat business than are larger facilities. Most hotels appear to have flexible rates and services. One need not fear to shop and bargain. Compare prices and services. If hotels are aware that you may be having additional conferences in ensuing months, they may provide some services for reduced rates.



Ask your Convention Bureau



similar program covers.

All arrangements with the facility should be confirmed in writing. Large hotels will usually provide the coordinator with an arrangement memo which indicates the specific meeting rooms, breakout rooms, and the number of sleeping rooms which have been reserved. The memo will indicate arrangements made for banquet and catering functions, use of the marquee, special parking privileges, rates and method of payment.

The hotel should be notified immediately of any mistakes in the arrangement memo, and all revisions confirmed in writing. Adherence to this procedure results in fewer surprises and misunderstandings when the bill is presented upon conclusion of the workshop.

One will find that workshops and conferences are considerably more satisfying if the location of the facility is different than the normal environment. Many groups, especially students, are enthusiastic about lakeside or mountain sites. If such locations are proximate, and the budget allows, they should be utilized whenever appropriate. This is not to suggest that administrators use plush hotels and students use rustic cabins.

Many community members are reluctant to become involved in sessions at school sites. Teachers, for other reasons, also find the school an uninviting location. Many churches and community centers are available and their potential utilization should be investigated.

When negotiating with convention centers, the coordinator must be alert to **gross** and **net** square footage charges. **Gross** square footage pricing requires the customer to pay for the aisle space, but **net** pricing provides aisle space free.

It should be noted that room capacity can vary depending on whether the seating is conference, banquet, theatre, or schoolroom style. Facility personnel will help the coordinator plan for the most efficient use of the rooms.

### **Content and Scheduling**

An effective workshop must be **participatory**. It should not be observatory. It is not a time for boring lectures, but for discussion and interaction. However, depending upon the uniqueness of the situation, lectures, demonstrations, and performances (telling, showing, and doing) may have their place. To change or reinforce opinions, attitudes and behavior the sessions must stimulate perspicacious thinking.

The workshop sessions must not be allowed to turn into "rap"

sessions. They must be structured to provide for the successful achievement of the workshop objectives. This can be accomplished if everyone knows the desired outcomes.

Presentors should be selected on the basis of their proven ability or demonstrated potential for success in dealing with the workshop objectives. The type and length of speeches should be clearly stated in advance. The effectiveness of outside consultants is lessened when attendees perceive that their presentations are irrelevant to local needs. On the other hand, local experts may be too familiar to the group, and, consequently, their opinions and ideas less respected.

Preliminary arrangements with presentors and consultants should be confirmed in writing and verified by phone call. The rate and method of remuneration for their services should be clearly understood by all parties involved.

Often workshop attendees are physically tired when they arrive at the conference. Others become very drowsy during the afternoon sessions—especially after a heavy luncheon. Do not underestimate the value of a few minutes of exercise during both the morning and afternoon sessions.

Allow ample time for coffee breaks. Some attendees need to smoke, and others insist on no smoking. If there are adequate breaks, it is more likely that the smokers and non-smokers can accommodate each other. If the coordinator does not allow for breaks, most attendees will take them anyway.

Allow for relaxation and fun. Do not feel that fun sessions are unproductive. When attendees enjoy the workshop, their participation is more relaxed and the probability that objectives will be met is much greater.

### **Audio-visual Equipment**

Charts and other visual aids can be a bane or a blessing depending upon their use. When used properly, they appeal to auditory and visual senses simultaneously, thereby increasing the impact of the presentation. But, when displayed too soon, charts can become distractions. Attendees may study the chart while you are attempting to deal with other issues. By the time the presentor is ready to discuss the chart, they may have lost interest and become bored with it. Make your visual aids work for you, not against you. Use them, then place them out of sight.

Chalk boards can be useful. They should be placed so that they do not reflect light, thereby causing glare or blind spots. Chalk

## AUDIO-VISUAL AIDS CHECKLIST

- |                                                  |                                                |
|--------------------------------------------------|------------------------------------------------|
| <input type="checkbox"/> 16mm Projectors         | <input type="checkbox"/> Record Players        |
| <input type="checkbox"/> Opaque Projectors       | <input type="checkbox"/> Tape Players          |
| <input type="checkbox"/> Overhead Projectors     | <input type="checkbox"/> Video Tape Players    |
| <input type="checkbox"/> Slide Projectors        | <input type="checkbox"/> Cassette Recorders    |
| <input type="checkbox"/> Spare Projector Bulbs   | <input type="checkbox"/> Blank Cassette Tapes  |
| <input type="checkbox"/> Projection Screens      | <input type="checkbox"/> Tape-Recorders        |
| <input type="checkbox"/> Rear Projection Screens | <input type="checkbox"/> Blank Recording Tapes |
| <input type="checkbox"/> Projection Tables       | <input type="checkbox"/> Microphones           |
| <input type="checkbox"/> Extension Cords         | <input type="checkbox"/> P.A. Systems          |
| <input type="checkbox"/> Take up Reels           | <input type="checkbox"/> Lecturns              |
| <input type="checkbox"/> Flip Charts             | <input type="checkbox"/> Easels                |
| <input type="checkbox"/> Flip Chart Pads         | <input type="checkbox"/> Chalkboards           |
| <input type="checkbox"/> Spotlights              | <input type="checkbox"/> Chalk                 |
| <input type="checkbox"/> Fuses                   | <input type="checkbox"/> Erasers               |

Has each presenter been contacted concerning audio-visual needs?

boards and easels should not be "talked to." The user of these aids must talk to the attendees.

The list of audio-visual aids on page 10 is by no means exhaustive. It does list, however, the more commonly used aids in workshops. Be certain that there are extension cords, take up reels, extra bulbs and fuses. If attendees include knowledgeable operators of audio-visual equipment, this should be made known to the presentors and consultants. If operators are unavailable, the presentor should test run the equipment prior to using it in the session.

Wise selection of appropriate aids which will assist and not detract is the key to successful presentations. The techniques must be varied and adaptable to the specific situation.

### **Agenda**

The workshop agenda need not be expensive to be attractive and tasteful. If the agenda appears to have been hastily and thoughtlessly prepared, attendee expectations may be lowered.

Agendas can be enhanced by using colored paper, line drawings, and covers similar to those in the centerfold of this manual. Line drawings of points of interest are often obtainable at minimal cost from stationery stores or local chambers of commerce. A printing job with a professional look can be approximated by using the variety of type elements available with IBM Selectric typewriters. The coordinator may get other ideas, suggestions and assistance from art students and teachers.

**THURSDAY, SEPTEMBER 24, 1975**

**1. MAIN SMALL GROUP SESSIONS**

8:30 am Registration

9:00 am Breakfast

9:30 am Session 1: *Workshop on the Use of the California State Assessment System*

10:30 am Session 2: *Workshop on the Use of the California State Assessment System*

11:30 am Session 3: *Workshop on the Use of the California State Assessment System*

12:00 pm Lunch

1:00 pm Session 4: *Workshop on the Use of the California State Assessment System*

2:00 pm Session 5: *Workshop on the Use of the California State Assessment System*

3:00 pm Session 6: *Workshop on the Use of the California State Assessment System*

4:00 pm Session 7: *Workshop on the Use of the California State Assessment System*

5:00 pm Dinner

**FRIDAY, SEPTEMBER 25, 1975**

**2. MAIN SMALL GROUP SESSIONS**

8:30 am Registration

9:00 am Breakfast

9:30 am Session 8: *Workshop on the Use of the California State Assessment System*

10:30 am Session 9: *Workshop on the Use of the California State Assessment System*

11:30 am Session 10: *Workshop on the Use of the California State Assessment System*

12:00 pm Lunch

1:00 pm Session 11: *Workshop on the Use of the California State Assessment System*

2:00 pm Session 12: *Workshop on the Use of the California State Assessment System*

3:00 pm Session 13: *Workshop on the Use of the California State Assessment System*

4:00 pm Session 14: *Workshop on the Use of the California State Assessment System*

5:00 pm Dinner

**GENERAL INFORMATION**

All workshop participants are requested to register at the registration desk. Your name tag will be provided there.

The hotel provides free parking for all of the in-house guests. There is a 50¢ valuation for other workshop participants.

Registration desk will handle messages 8:00 am to 4:00 pm on both days of workshop. Please alert us regarding specific needs.

Workshop has been approved by the California Department of Education for 3.3 credit. Attendees in all sessions should notify their district official in their district.

By evaluating this workshop, your response will assist us in future workshops.

Districts eligible for reimbursement will be provided forms at the registration desk. Please save all appropriate receipts. Your field representative will be happy to explain procedures to you.



**ERESNO**

There is no substitute for a thorough, attractive agenda.

## CONDUCTING THE WORKSHOP

The key to a successful workshop lies in the planning. Nevertheless, we would do well to remember what happens to "the best laid schemes o' mice an' men . . ."

The effective coordinator is continually alert to possible contingencies. What happens if the microphones do not work properly? What happens if assistants fail to arrive on time? Suppose it snows, or there is heavy fog, or there are transportation strikes or breakdowns. This is not to suggest that there need be complete backup plans for every eventuality; however, the alert coordinator must be aware of a variety of viable alternatives.

### Registration

Most of the work of registration can be done prior to the workshop if preregistration procedures have been instituted. Name tags should be prepared in advance when possible. Attendees should be greeted by pleasant, courteous staff members who are prepared to assist them with their individual needs. Some may be expecting important phone calls. Some may have specific dietary requirements. Some may be shy and in need of the reassurance of a friendly smile. Others may come to the registration table who are obviously at the wrong workshop!

The registration form should be as specific, yet simple, as possible. It should only request necessary information. There should be sufficient agendas, registration packets and other materials for all preregistered attendees. If there is a possibility that there may not be sufficient materials for all who will register at the beginning of the workshop, the materials for those who did preregister should be separated in advance.

It is often very convenient to have separate registration tables

## REGISTRATION AIDS CHECKLIST

- |                                               |                                           |
|-----------------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Agendas              | <input type="checkbox"/> Clip boards      |
| <input type="checkbox"/> Registration forms   | <input type="checkbox"/> Chalk            |
| <input type="checkbox"/> Registration packets | <input type="checkbox"/> Masking tape     |
| <input type="checkbox"/> Handouts             | <input type="checkbox"/> Transparent tape |
| <input type="checkbox"/> Name tags            | <input type="checkbox"/> Typewriter       |
| <input type="checkbox"/> Ballpoint pens       | <input type="checkbox"/> Typing paper     |
| <input type="checkbox"/> Felt tip pens        | <input type="checkbox"/> Rulers           |
| <input type="checkbox"/> Pencils              | <input type="checkbox"/> Rubber bands     |
| <input type="checkbox"/> Pencil sharpener     | <input type="checkbox"/> Tacks            |
| <input type="checkbox"/> Scratch paper        | <input type="checkbox"/> Hammer           |
| <input type="checkbox"/> Paper clips          | <input type="checkbox"/> Screwdriver      |
| <input type="checkbox"/> Index cards          | <input type="checkbox"/> Pliers           |
| <input type="checkbox"/> Staplers             | <input type="checkbox"/> Nails            |
| <input type="checkbox"/> Staples              | <input type="checkbox"/> Aspirin          |
| <input type="checkbox"/> Staple remover       | Other special aids:                       |
| <input type="checkbox"/> Scissors             | _____                                     |
| <input type="checkbox"/> Cash box             | _____                                     |
| <input type="checkbox"/> Manila envelopes     | _____                                     |

**It is much better to have it and not need it,  
than to need it and not have it. Be prepared!**

for those who preregistered and those who did not.

Every attendee and participant in the workshop should be welcomed and made to feel relaxed and comfortable.

### **The Workshop**

The workshop should begin on time.

There will probably be introductions of dignitaries, consultants and others. Following the introductions the coordinator or his designee should review the agenda. Attendees enjoy a general oral description that spells out the relationship between participants, resources and objectives. Also, there may have been changes in room locations, times, and/or activities since the agenda went to press.

This is the proper time to advise attendees that there is flexibility in the agenda, and that during the course of the workshop they should provide feedback concerning the activities and their anticipated impact on the workshop objectives.

The coordinator should then turn the workshop over to the other participants on the program. If there are no problems and the planning has been effective, the workshop will run smoothly. If there is a need to modify objectives, activities or procedures, the coordinator will provide the necessary direction to effect this modification with minimal inconvenience. The coordinator may have to settle disputes, encourage or discourage participation from specific attendees, or adjust the flow of the schedule to provide for the various needs of participants.

### **Evaluation**

If we have no desire to know whether or not we were successful in meeting our objectives, we have no need to evaluate. If we plan no future workshops or conferences, there is probably no need to determine the success or failure of our efforts. If we do not value the feedback of the attendees, there is no need to waste their time asking them to fill out forms and respond to questions.

The **why? when? where?** and **how?** of workshop evaluation is the subject of a subsequent manual.

### **Adjournment**

The coordinator should see that the meeting is adjourned on time. If interest is high and some participants choose to remain for further dialogue, this should not be discouraged—provided it will not place unreasonable or unnecessary demands on others

who may have to clean and close the facility.

The coordinator must verify whether those delegated the responsibility for returning supplies and equipment, especially films, have done so.

### **Follow-up Activities**

The workshop is over and the coordinator may rest. However, he has not discharged his duties until he has seen that summary reports are prepared; promised materials are sent to attendees; the bills are paid; and letters of appreciation are sent to all who assisted in the planning, development, implementation and evaluation of the workshop.

## CHARACTERISTICS OF SUCCESSFUL WORKSHOPS

A coordinator who pays direct attention to all details—no matter how small—developing contingency plans for a variety of potential emergencies.

A few, unambiguous attainable objectives appropriately communicated to all participants prior to the workshop.

A properly ventilated, well-lighted comfortable session site—free from noise and other distractions—of proper size to accommodate the group.

A respect for budgetary constraints, and rapid payment of all obligations.

A rapid registration system staffed with efficient, pleasant, courteous registrars.

A well-orchestrated audio-visual plan which includes modern equipment, spare bulbs and fuses, extra reels and extension cords, and operators familiar with the equipment.

An attractive, thoughtfully planned agenda which is subject to amendment, if necessary, to meet the workshop objectives.

A coordinator who encourages active participation by all attendees, and effectively prevents monopolization of group discussion by a few outspoken individuals.

Some specific information, materials, skills, and/or techniques which attendees can put to immediate use.

Plans for follow-up activities based on decisions made during the workshop.

## COORDINATOR'S CHECKLIST

This checklist is designed to assist you with the successful planning of your workshop. Positive responses indicate good planning.

Have you ...

### PRELIMINARY PLANNING

- Determined the desired workshop outcomes?
- Developed a few, specific attainable objectives?
- Communicated these objectives to potential attendees?
- Provided for attendee feedback on the objectives?
- Deleted all extraneous issues from the workshop?
- Informed presentors and consultants of workshop objectives?
- Developed the workshop theme or slogan?
- Considered the impact of the weather when determining workshop dates?
- Set dates?

### BUDGET

- Established a realistic registration fee?
- Estimated total receipts from registration fees?
- Prepared a sample budget?
- Considered the hidden costs?
- Revised budget as estimated costs became actual costs?
- Attempted to economize whenever possible?

### ATTENDEES

- Initiated written communication with attendees informing them why? when? where? how much? and related benefits?
- Involved attendees in the development of the workshop?
- Assisted attendees who wish to prepare for the workshop?
- Provided for and encouraged preregistration?

### CONVENTION BUREAUS

- Informed your convention bureau of the workshop?
- Requested assistance with facility selection, publicity, and registration?
- Requested name tags, agenda covers, visitor's guides and informational brochures?

### FACILITY SELECTION

- Sought an attractive, comfortable, luminous site?
- Personally inspected the proposed site?
- Sought and bargained for the best rates?
- Confirmed all plans and revisions in writing?
- Received a function agreement or an arrangement memo?
- Requested use of the marquee?

### CONTENT AND SCHEDULING

- Provided for fun sessions? Change of pace sessions? Breaks?
- Provided for interaction, participation, and involvement?
- Attempted to eliminate boring lectures?
- Advised presentors of type and length of speeches?
- Confirmed all arrangements with presentors in writing?
- Verified all arrangements with presentors by phone?
- Provided for a.m. and p.m. exercises?

#### A-V EQUIPMENT

- Used the A-V aids form on page 12?
- Decided who will operate the A-V equipment?
- Obtained modern equipment?
- Obtained extension cords for all electrical equipment?
- Test run projectors, recorders, record players and other machines?
- Prepared for A-V emergencies, namely blown fuses, burnt out bulbs, poor mikes?

#### PUBLICITY

- Listed printing needs?
- Alerted the press?
- Arranged for a photographer?
- Developed your promotion schedule?
- Engaged the convention bureau in publicizing your workshop?

#### AGENDA

- Prepared an attractive agenda?
- Thoughtfully planned the content of the agenda?
- Provided for flexibility in the agenda schedule?

#### REGISTRATION

- Engaged efficient, pleasant courteous registrars?
- Collected the registration supplies indicated in the form on page 14?
- Arranged separate registration tables for those who did and did not preregister?
- Informed participants of transportation arrangements from airport to site?

#### THE WORKSHOP

- Considered alternate activities and entertainment for spouses?
- Arranged for a display area?
- Identified decoration requirements?
- Prepared signs and banners?
- Prepared for medical emergencies?
- Arranged a telephone message system?
- Provided a bulletin board for messages?
- Provided for check cashing privileges?
- Arranged parking validation?
- Planned meal functions appropriately?
- Prepared to revise the schedule if necessary?
- Planned to effectively evaluate the workshop?
- Planned for a variety of contingencies unique to your particular workshop?

#### FOLLOW-UP

- Arranged to collect and return materials, equipment and supplies?
- Arranged for follow-up activities?
- Prepared the final workshop report?
- Paid the bills?
- Sent letters of appreciation?