International Council on Archives

Section of Records Management and Archival Professional Associations

ORGANISING TRAINING WORKSHOPS AND SEMINARS: GUIDELINES FOR PROFESSIONAL ASSOCIATIONS

2010

Introduction

One of the activities commonly undertaken by professional associations is arranging training workshops and seminars. These guidelines have been developed by the Section of Records Management and Archives Associations (SPA); they do not cover program content but planning activities that will ensure the organization of a successful event. The guidelines are based on the understanding that successful training workshops and seminars depend not only on the quality of training provided but also on the planning that supports the delivery of the sessions.

Pre event activities

□ **Form an organising/planning committee**

The role of a workshop/seminar committee is to take responsibility for putting on the event. The committee would usually be appointed by the executive of the association (or the principal management group) and would be required to report on progress. The size of the committee will depend on the size of the event, but as a general rule there needs to be an adequate numbers of members to ensure that the work load and responsibilities are shared and not too burdensome for any one member. The organization and responsibilities of committee members may vary but generally the roles of chairperson, treasurer and secretary will be needed to effectively manage the event and an editor if there are plans to publish the proceedings. These positions could be created for the specific event working under the general direction of association office bearers e.g., the association treasurer will probably want to provide guidance on handling money to conform to association guidelines. Alternatively, association office bearers (e.g., the secretary and treasurer) may undertake these roles on the committee.

□ **Draw up a timetable/ timeline**

A timetable is an important planning document identifying:

- all the activities to be undertaken,
- individuals responsible, and
- deadlines for completing each activity.

□ **Decide on a date**

The date will depend on the availability of the venue and the presenters. Care should be taken to ensure that the date does not conflict with public holidays, religious celebrations and other association events.

□ **Develop a program**

Developing a program is an early task that needs to be undertaken by the committee. To do this:

- review past workshops/seminars and in particular 'lessons-learnt',
- determine specific goals and learning objectives for the session,
- if your association has a continuing professional development program, decide if points or credits will be allocated for seminar attendance,

- decide on themes, topics, number of sessions,
- identify possible speakers (a well known keynote speaker will attract participants),
- determine the format (e.g., interactive, lecture style),
- develop a draft program,
- issue invitations to suggested speakers,
- decide on whether proceedings will be printed, and
- finalise the program.

□ **Draw up a budget**

Drawing up a budget will allow the committee to identify where money is expected to come from and what expenses are likely to occur. With this information the committee will be in a good position to say how much money will be needed, how much money will be available to be spent, determine the registration fee, how many attendees are needed to break even, whether or not a profit is expected or whether the association may be required to carry a loss.

Expenditure may include:

- payment for speaker/presenter (i.e., for travel, expenses and speaking or honoraria payments),
- venue hire,
- equipment hire,
- catering,
- materials (e.g., paper, pens, name badges, etc.),
- promotion (e.g., printing, advertising),
- information packs,
- postage, and
- printing of proceedings.

Income will to come from:

- registration fees,
- sponsorship,
- subsequent sale of proceedings (i.e., if decision is made to produce proceedings), and
- funds provided by the association.

Registration fees are generally calculated by using the formula:

Fixed cost per person PLUS meals and material cost per person

It is usual to offer various levels of registration for:

- members of the association,
- non-members,
- students, and
- members of allied associations.

A decision also needs to be made on whether discounts will be offered to *'early bird'* registrants and for groups. It is very helpful to the committee to know several weeks prior to the event how many people will be attending.

When drawing up the budget it is also useful to develop a *cancellation and refund policy*. In developing such a policy consider:

- the cut off date when refunds will be made,
- whether an administration fee will be charged,
- whether a registration can be transferred to another person,
- how a cancellation can be made (e.g., by email, fax, mail),
- who should the cancellation notice be sent to, and
- including a 'no show' clause (i.e., detailing a statement on refunding those who registered but did not show up).

□ **Seek sponsorships**
Registration fees can be reduced if the budget is partially met by sponsorships. The association may have general procedures on seeking and managing sponsorships which the workshop/seminar committee will be required to follow.

Sponsors could be sought to donate the costs for a session speaker, host a morning/ afternoon tea or lunch or contributing material such as badges, folders, notebooks etc. Sponsorship could be promoted through an announcement at the event or by including the sponsor's logo on promotional literature and in the proceedings if they are published. The sponsor could also include promotional literature in workshop information packs.

□ **Select a venue**
Below are some criteria to consider when selecting a venue:

- Does it fit the budgetary allocation?
- Is it accessible to public transport?
- Does it have disabled access?
- Is there parking available? Will participants have to pay for parking?
- Are the facilities acceptable (e.g., toilets clean and accessible, cloak rooms available)?
- The length of the seminar (e.g., is it over several days and if so, will accommodation arrangements need to be offered)?
- Are there any special security requirements?

- Is there adequate heating/ cooling?
- Is there sufficient space for planned activities?
- Can furniture be rearranged to suit your requirements?
- Is access to the venue possible to set-up the facility?
- Is there access to power points?
- Is equipment provided by the venue (e.g., whiteboards, flip charts, chairs, tables, sound equipment etc.) or required to be borrowed or hired?
- Will the venue cater for food and beverage requirements or will separate arrangements need to be made?

□ **Develop a registration brochure.**
The style of the brochure will depend on the target audience and resources available for its production/printing. It could be a simple photocopied page or a glossy brochure. The design and format will also depend on whether you are offering online registration. Whatever the format consider including the following details:

- the theme and aims of the event,
- program summary,
- date of the event,
- location details (e.g., parking arrangements, map),
- participant details – name/ address/ employing institution/ phone/ mobile/ employer/ email/ preferred name on name badge,
- registration fee options (e.g., member of the association, student etc.),
- closing date for registrations,
- early bird/ group registration discounts,
- payment options (e.g., credit card, via internet, cheque, bank draft etc.),
- where to send completed registration forms (post, email, fax, website addresses),
- special requirements (e.g., dietary/ access),
- contact details for event administrators (postal address, email, fax, email addresses), and
- substitution, cancellation and refund policy.

□ **Plan a promotion campaign to advertise the event**
The success of the event will largely depend on a successful advertising campaign aimed at targeting key audiences. Promotion ideas include:

- developing posters, flyers,
- develop, print and distribute workshop/seminar registration brochures,
- developing a website for the event,
- advertising in the association's newsletter/bulletin and on its website,
- advertising in the publications of allied associations,
- sending emails to potential participants, and
- doing interviews on local media.

□ **Send confirmation letter to registrants**
This letter could be sent by mail or email to participants to confirm that their registration has been received. It could include:

- a receipt for the registration fee paid,
- reiteration of dates and place of seminar/workshop,
- directions/map, and
- location and time of registration.

When confirmation letters are sent, develop a *list of participants* to be used to check off registrants as they arrive on the day of the event.

At this point *attendance certificates* to be handed out after the event could be produced.

□ **Maintain contact with speakers/presenters**
Maintain contact with the speakers/presenters to ensure they are kept briefed about the program and arrangements. If they are coming from another city picking them up from the airport/ bus or train station and bringing them to the venue would probably be appreciated. Make sure that their equipment needs are identified and provided on the day. If there is a session chairperson encourage contact with the speaker/presenter before the event.

□ **Organise equipment**
Determine where you will get the computer/ audiovisual equipment needed for the workshop/seminar to save last minute concerns. Venues often provide equipment or it may have to be borrowed or hired for the occasion. Equipment may include:

- computers (is an internet connection required?),
- PowerPoint projector,
- overhead projector,
- screen,
- pointer,
- microphones, and
- video camera.

Other equipment needed could include:

- pens, paper,
- flip chart and markers,
- whiteboard/backboard,
- thumbtacks,
- blu-tack, and
- post-it notes.

□ **Develop an evaluation form/s**
Evaluations provide organisers and presenters with important information about the event. These forms can be handed out after each session and/or at the end of the event. Possible questions to include on an evaluation form to be handed out at the end of each session include:

- What aspects of the session did you find useful?
- What aspects of the session were least useful or could have been improved?
- What issues or questions do you want to know more about?
- Any other comments you would like to make?

Possible questions to include on an evaluation form to be handed out at the end of the event include:

Content:
- What aspects of the workshop/seminar did you find most useful?
- What aspects were least useful or could have been improved?

Methodology:
- Which presentations or activities did you find most effective and why?
- Which presentations or activities did you find least effective and why?

Venue:
- Comment on the venue – rooms, facilities, ease of access etc.
- Comment on the food.
- Comment on the organization of the event.

Additional comments:
- Please provide any additional comments about any aspect of the seminar/workshop.

□ **Prepare participants' information packs/folders**
These individual packs for participants can include:

- a copy of the program,
- information on the venue,
- training material to be used in each session (unless handed out separately),
- biographical details about speakers/presenters,
- evaluation forms,
- pens/writing pads,
- list of participants,
- sponsorship material.

If participants are not members of the associations, membership forms and information about the association could also be included.

Activities on the day

□ **Allocate overall responsibility**
Clearly define who will have overall responsibility for making decisions and changing arrangements on-the-day.

□ **Organise helpers/volunteers**
It will be important to organize helpers and volunteers on the day to ensure they provide the most effective logistical assistance. They need to be thoroughly briefed on the program, the venue and facilities and should have easily identified name badges to identifying them to participants as people they can ask for assistance.

Tasks these helpers/volunteers can carry out include:

- liaising with caterers,
- setting up and testing equipment,
- making sure equipment is securely stored during breaks,
- setting up signage,
- setting up and provide assistance on the registration and sales desks,
- setting up room/s (e.g., is ventilation and room temperature comfortable, water and glasses on each table, distribute handout material for each participant),
- supporting presenters before, during and after the session,
- photocopying,
- distributing and collecting evaluation forms, and
- assisting with winding-up activities (e.g., handing out attendance certificates, packing up equipment, etc.).

□ **Set up the venue**
Setting up the venue can include:

- putting up signage (e.g., room numbers, facility directions),
- organising room/s (e.g., arrange chairs/tables, distribute workshop material),
- making sure seminar/workshop materials are available,
- organising the registration desk (should have on hand a list of participants, registration packs/folders, participant name tags, map of venue),
- organising a sales table for association publications and other sales items.

□ **Present general announcements**
Arrange for one person to gather and compile this information and to announce it at the beginning of each session (e.g., information on whereabouts of facilities, where morning/tea and lunch will be served, whereabouts of telephones and internet/computers, evaluation forms, and other specific information).

□ **Arrange for photos to be taken documenting the event**
Photographs of the venue, presenters, participants and sessions can be used to promote the activities of the association in newsletters and on websites and also in the proceedings if these are being produced.

Post event activities
□ **Write thank you letters to presenters, sponsors, helpers and volunteers.**

□ **Publish and distribute proceedings**
Printing proceedings of a seminar/workshop will depend on the nature of the event (e.g., for a training workshop which relies on one-on-one contact and hands-on exercises printing proceedings would probably not be an option, whereas it may be an option for a one off seminar on a particular topic). Deciding if proceedings will be published needs to be made early in the planning cycle to take into account budget requirements and the need to make speakers aware that they will be required to submit copies of their papers. If a decision is made to print the proceedings of the seminar/workshop steps to be undertaken include:

- gather papers from speakers,
- confirm copyright arrangements with authors,
- edit papers and liaise with authors over suggested changes,
- seek quotes from designers and printers,
- select designer and printer,
- submit edited copy to the printer,
- examine proofs, make corrections and return to printer,
- approve proofs,
- distribute copies of proceedings to participants, speakers and sponsors, and
- arrange to promote and sell proceedings to the public and association members.

Publication may also be done online via the association's website with limited access by participants, speakers and sponsors. Selling proceedings to those interested in the topic but who did not attend the event may also be an option for the association.

□ **Pay outstanding accounts and develop a closing balance sheet.**

□ **Prepare a report on event**
A report written for the association's executive or governing body after the event summarizing outcomes and identifying lessons learnt will provide valuable information to assist with organising future sessions. Consider including the following details in the report:

- an overview of planning and activities undertaken,
- summary of evaluation forms,
- financial summary (receipts and expenditure),

- comments on venue, and
- lessons learnt to support future planning.

A report could also be written for seminar sponsors.