



**Make  
Your  
Workshop  
ROCK!**

*A guide to planning  
successful workshops and  
conferences*

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# **Make Your Workshop ROCK!**

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Make no little plans; they have no magic to stir men's blood and probably will themselves not be realized.  
Make big plans; aim high in hope and work, remembering that a noble, logical diagram once recorded will not die.

**-Daniel H. Burnham**

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## Introduction

- Are you interested in advancing your group's mission by hosting an event but are hesitant because you fear the stress and time commitment?
- Have you volunteered (or been “volunteered”) to organize an event and have no idea where to begin?
- Does the thought of organizing your sock drawer not to mention an event for your colleagues or supporters increase your cortisol levels to a dangerously high level?
- Do you desire confidence when developing and hosting workshops for your peers?

If you answered “yes” to any of the above questions then this book is for you. Even though different organizations and institutions plan meetings of various sizes, the steps to make them a reality are essentially the same. **Make Your Workshop ROCK! A guide to planning successful workshops and conferences** is designed to give you insights and tools needed to plan and execute events of any size that honor your vision while managing the necessary details of the event.

### **Can't I just hire someone to do the logistics and let her deal with the details?**

No. Event planning requires a team of committed individuals. As the event organizer, you are in a leadership role for this team and your responsibility extends to oversight of the logistical details and the “big picture” for the event. You need to develop and effectively articulate a vision for the event including measurable goals that are supported by the details of planning. You also need to gather the appropriate parties to collaborate with you on the content of the program as well as implement the logistics.

Keep in mind, however, that committee members or support staff cannot effectively implement the details of your event without a clear understanding of what YOU want the event to be and how you want to make it happen. The dynamic processes in planning an event require the delicate balance of a solid understanding of your field, your attendees' needs, and more administrative skills like budgeting and

negotiating. With appropriate support and effective ongoing communication about the desired outcome, planning an event can actually be a satisfying experience for all involved parties.

### What does an Event Chair really do?

As an event organizer or Event Chair you are responsible for tasks including but not limited to:

- Developing the vision for the event
- Determining the theme
- Determining the date
- Recruiting a planning committee
- Securing funding
- Creating a budget proposal
- Hiring or assigning an Event Manager or Event Coordinator
- Delegating responsibilities to committee members
- Preparing a calendar with target dates and deadlines
- Extending invitations to speakers, sponsors, VIPs (e.g., leaders in your field)
- Contacting appropriate administrative staff who may provide assistance through all phases of planning
- Archiving event materials
- Writing the final event report

Many organizations have experienced professionals on staff to provide assistance in all phases of planning and implementing your event. The goal in partnering with those professionals is to ease the burden of planning so that you may focus your attention on the content of your program. As soon as you consider hosting an event, reach out to your contacts to establish a relationship with an Event Manager or Event Coordinator. If your group does not employ these professionals, you may want to consider hiring a professional to facilitate your planning. Remember to include the cost of the Event Manager in your overall budget.

## What can I expect an Event Manager to do?

An experienced Event Manager will provide support to you and your committee in the following areas:

### ***Planning***

- Consulting to help refine the event purpose, objectives, format, budget, venue requirements
- Representing your group at planning meetings
- Arranging site tours
- Providing resources for services and speakers
- Developing conference evaluation forms

### ***Financial Administration***

- Developing customized budgets and setting registration fees
- Administering budgets and ensuring payment of all expenses
- Ensuring processing of any participant and/or sponsor refunds
- Compiling final summary of all financial transactions

### ***Facilities and On-Site***

- Identifying venues, conducting site visits and managing contracts
- Negotiating hotel rates and coordinating room blocks
- Handling speaker arrangements (transportation, compensation, travel and presentation logistics)
- Working with event exhibitors and sponsors
- Coordinating all meals and refreshment breaks
- Coordinating audiovisual needs

## ***Registration***

- Managing online, email and in-person registrations
- Compiling participant reports including email contacts
- Developing, printing, and assembling all participant packets

## ***Coordination***

- Consulting during implementation and post-conference evaluation
- Serving as single point of contact for logistics and operations
- Preparing and posting directional signs

So are you ready? Let's begin the process of planning your conference with the fun and exciting phase that encourages you to **DREAM: Envision, establish and create.**



# **DREAM:**

## **Envision, establish and create**

“Without leaps of imagination, or dreaming, we lose the excitement of possibilities. Dreaming, after all, is a form of planning.”

**-Gloria Steinem**

## Chapter 1 Envision

“When developing an idea, I remind myself not to start with compromise. I envision the ideal manifestation of the idea, as if I had no limits in resources, materials, or permission.”

—Janet Echelman

We’ve discussed that a workshop or conference is an event and its planning involves lots of details that are more associated with administrative tasks rather than intellectual exercises. That said, the intention of holding any event or conference is to exchange ideas. Even though you may have administrative support available from your organization, the workshop or conference organizer is responsible for the “big picture” of the event and its participants. The good news is this phase of planning is usually the most fun and intellectually stimulating for the organizer. This is the time to dream about what you want to achieve with the event without the constraints of logistics (that will come soon enough).

I should emphasize that creating a strong vision that includes measurable goals and objectives for your event and building the planning and preparation from that foundation is arguably the most important stage in the whole process of workshop and conference planning. Your vision for the event should attract your participants as well as be consistent with what your organization wants. Determining the vision is not an easy task or solitary process; however, once you and your committee have established the vision, deciding the theme, location, and possible speakers falls into place. It is advised to determine the vision in a collaborative manner in order to garner support and “buy in” from others to avoid possible future misunderstandings. Remember that for any group to move forward in planning they need to fully understand their mutually agreed-upon purpose.

### How do I develop a vision collaboratively?

1. One of the most effective (and free) ways to assist in developing your vision is to observe and gather information by leveraging social media. You may survey potential participants about what they want in programming via Twitter, Facebook, or your blog. You may also create a poll or survey for your website and begin the “pre-event buzz”. One resource you may find helpful is [SurveyMonkey](#). SurveyMonkey is a free tool