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# Blueprint for Planning a Successful Program

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# PLANNING A SUCCESSFUL WORKSHOP, PROGRAM OR CONFERENCE

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## Introduction

Sooner or later it happens to most of us. There is a very good chance it could happen to you. One day you will get the news that you have been selected as the perfect candidate for planning the program, the workshop, the pre-conference or the conference which will attract dozens of eager participants who want to know everything about --insert the subject of your choice. Sometimes we even do this to ourselves, volunteering to take on this role for one reason or another.

We have all been to events which could have been better organized. We have all said, "If I had planned this conference I would have done things differently." The reality is that planning an event for a large number of people is a complex task. The success of any event hinges on small details; instructions, signage, food, equipment, and so on. The meat of the program or conference is very much flavored by the impressions made prior to the event itself.

Librarians tend to have very good organizational skills in general, but as in all populations, some have more experience than others. Doing anything for the first time is hard work. A first time program planner may overlook important details simply because she has never had to plan one before. For those program/conference planners whose experience in this area is small, here are some tips for conference planning which may help to make the overall experience better for you, for your committee, and for your program/conference participants.

## STAGE ONE: INITIAL PLANNING

### Form a planning committee

Planning a successful program is a big job. You will need people to find and coordinate the location, technology, and food, to handle registration, to arrange for speakers, to publicize the event, and to duplicate printed materials. In order to get all of this done and to make sure that preparation for the event doesn't become anyone's full time job, you will need a number of responsible, creative, and competent people to carry out all of these tasks.

Ideally, your planning group should contain individuals with some previous experience planning a program. Members of the group should have excellent organization and communication skills. Getting people involved in planning a program is also an excellent way to build leadership skills and increase participation within your organization. For example, involving library school students not only provides additional assistance, but helps them gain valuable experience and network with librarians in the field.

**Select a program topic**

Obviously, your program topic should be of interest to your membership and other potential attendees. The topic should be of current relevance and should be focused. Don't make it too broad. For possible topic ideas, look to feedback from your membership (such as suggestions from previous program evaluations) or to topics covered recently at national conferences.

**Select a date**

Selecting the right date is crucial to the success of your event. Avoid conflicts with other professional programs which might be scheduled for the same day or even the same week. Also, be aware of holidays, long weekends, and the cycle of the academic calendar in general, for example, busy final-exam periods or the beginnings of semesters. If you are a sub-group of a larger organization, check to see if there is a policy on coordinating program times to avoid conflicts.

**Select a location**

Along with picking the right date, choosing the location is perhaps one of the most important decisions you will make. The location should be central to the population of your group. It should be easily accessible and should have adequate parking if at all possible. Make sure you find a facility that is large enough to accommodate the number of attendees you expect in whatever configurations you require. Will you require large lectures or small group break out rooms? Keep in mind any limits on room capacity set by the Fire Marshall or other authority. The location you choose must have adequate technological resources and support. Don't forget to find out if you will need to pay any fees for the use of the facility.

**Find speakers**

Speakers should be experts on the topic. In some cases, you will identify an expert and approach her to speak. In other cases, you may wish to issue a call for proposals. If you take this second approach, make sure that you are clear and direct in your instructions, that you have a firm cut-off date for submission, and that you ask for an abstract. Let potential speakers know how long they will be asked to speak, what you would like them to address, and the size and composition of their audience. Make sure they know what you will provide for them, for example an honorarium, meals, lodging, and transportation. Ask speakers to send you their power point slides, handouts, and bibliographies 2 weeks before the program.

## STAGE TWO: DEALING WITH THE DETAILS

Success is in the details. Everything requires a "think through", some things require a "run through". There is nothing like a rehearsal to work out the kinks in any performance. The more you do prior to the program, the less you will have to worry about during the program.

**Conference location**

Well before the event, visit the site. Double check that the rooms in the facility will accommodate the number of people registered and that the configuration of the space is adequate. Specifically, count the number of chairs, make sure that any visuals can be seen from all seats, be aware of any special lighting needs, make a mental note of the air quality and temperature of the facility, and ask questions about any changes that can be made. Inquire about potential disruptions, for example scheduled construction or technology interruptions. Rehearse functions like registration and breaks to see how to best arrange the space.

Make sure the space you choose has the appropriate wiring and other technology for what you want to do. Don't rely on any promises that wiring or other infrastructure that is not yet in place will be available by the date of your event. Inquire into the availability of Internet access, desktop/ laptop computers, projection equipment, microphones, speaker podiums with lights, and electrical outlets. Find out if technicians will be available to set up and operate any equipment and whether or not they will be on hand throughout the event to help with any problems that arise. Make any arrangements for video and/or audio taping of the event.

**Publicity**

Publicize your event early, with regular updates as you get closer to the actual program. Advertise your event through mailings, listservs, web sites, newsletters, and calendars. Make sure that in each of the forums you advertise, the information is consistent and that dates, times, and places have not been changed by inadvertent typos or inattention. Proof-read everything numerous times before it goes out. Include all relevant information in your publicity: the vital who, what, where, when and why. Provide sources of additional information, such as a web site.

**Registration**

Set a limit on the number of attendees, and do not overbook. Don't forget to count your committee members in the number of attendees! Also, set a cut-off date for registration and stick to it. You will need to arrange in advance for catering and photocopying, and you will want to have an accurate count of attendees for this purpose. Registration forms for the event should be made available well in advance and in as many formats as necessary, such as online and paper. Gather all the information you will need from each registrant, including name, title, institution, address, phone, fax, e-mail, session

preferences when applicable, food preferences, whether they require a receipt, and any special needs. On the form, you may also wish to provide the opportunity to join your organization. Have all registrations processed at one central location to avoid confusion. Registrations should be acknowledged in a timely manner, and additional information should be provided at this time, such as a receipt, directions to the event, local amenities, assignments for breakout sessions, and the like.  Registration fees should be accounted for and deposited quickly and efficiently. Decide on a policy for refunds whether or not you will allow them, under what circumstances, and up until what date.

**Finances**

Determine how much it will cost to hold the event. Factor in the costs of the facility, equipment, catering, printing, mailings, speakers' honoraria, lodging, and travel. Subtract any subsidies you have been provided and divide by the number of participants to arrive at a registration fee. If your budget is such that a registration fee is not required, consider whether or not you wish to charge a nominal fee anyway. It might be the case that by charging a small amount, you will get a more reliable count of attendees.

**Speaker liaison**

Have specific people on your planning committee assigned to the role of speaker liaison. The liaison will communicate with the speaker, gathering information such as the speaker's biography, equipment needs, and advance copies of handouts and presentation materials. The liaison will also provide speaker with vital information about travel, lodging, equipment, and logistics.



**Program packets and handouts**

There are some standard things which should be included in a program packet.
There are also some things that it is just nice to have. The following list contains both.

Name tag (pre-printed when possible)
List of attendees with contact information
Outline of the day / program
Lunch information (list of restaurants, or where to pick up your box lunch)
Bathroom locations
Travel and housing information
Evaluation form
Scrap paper / note paper
Speakers handouts
Speaker biographical information
Membership form for your organization(s) both committee and parent
organization, if applicable

Bibliography of related resources
List of any web addresses to which speakers refer during their presentations
Receipt if not previously mailed
Explanation of how the group is to be divided if necessary and instructions as to where each individual is supposed to go for breakout sessions or concurrent sessions


# STAGE THREE: THE DAY OF THE PROGRAM

## Signage, signage, signage

There is nothing more frustrating than trying to get to a conference or meeting in a location you have never visited before and discovering that you have been left no clues as to how to get from point A to point B. On the day of the program, post numerous and visible signs to parking, from the parking lot to the building, from the building to the room or rooms within building, to bathrooms, elevators, telephones and any other necessary conveniences. Don't rely on signs already at facility. Make signs unique for your program. Use a recognizable logo, color and/or typeface.

## Get to the program site early

Be prepared to deal with problems and emergencies.  Set up any equipment and make sure it is working. DO NOT ASSUME ANYTHING! Power Point presentations should be loaded on the computers from which each speaker will be making his/her presentation. This helps to allow for seamless transitions between speakers, and obviates the need for changing equipment or settings during the program.

## Refreshments

If refreshments are being offered during registration, make sure the caterer is on site and has everything in order.

## Take a walk, take a look

Check all rooms and spaces and see that everything is as you want it. If there are problems, go to the contact person identified in your Stage Two preparations. Stay flexible. Try to have a back up plan for technology problems. For example, you may want to have Power Point slides made into transparencies and be ready to show them on an overhead projector, if necessary.


## Set up the registration area

This is the first impression your guests will have of you, your facility, and your organizational skills. To this end, keep registration as quick and simple as possible. Have materials for registrants available in alphabetical segments by last name. Provide all program materials at the same time and place. Do not require registrants to stop at

many different places for bits and pieces of information. The registration space should be big enough to handle the total number of people registered. There should be adequate space for formation of lines to the registration table. Have enough people stationed at strategic spots to keep attendees moving in the right direction. If the registration is away from the program location, be sure to direct people to the program site. The process should flow easily from left to right if possible. Any lines people need to wait in should be labeled.

## Questions

Make sure there is someone available to answer any questions that people have as they walk in. They should feel greeted, welcomed. Other people should be posted at critical places along the route to registration and on the route to the program location. Program staff should be identifiable to attendees-- use name tags of a special color or wear "team" t-shirts.  Make sure all helpers know critical things like the location of restrooms, public telephones, and general emergency procedures. Have staff offer help, rather than waiting to be asked. Have a contact person stationed in a fixed location to answer questions and offer assistance throughout the program.

## Food

Many programs offer refreshments during the registration period. After registering, attendees should be directed to the refreshment area.

## Speakers

Remember that your speakers will be nervous or at least preoccupied. They shouldn't have to think about organizational details. They should be able to focus only on the content of their presentation. Have the liaison assigned to each speaker stick with that person to introduce, get water, click slides, and deal with technology snags. Reinforce time constraints.

## The program itself

A master of ceremonies should start the program by introducing him/her self and welcoming attendees once again. Any announcements or housekeeping details should be made at this time. Then place the program in context. Introduce the program and its intent. Run through the day's program quickly, and direct attention to the materials picked up at registration.  Start on time and stick to the schedule. Do not let speakers run over. Have people assigned to introduce speakers and moderate discussions. Keep speakers on track and on time by holding up a card indicating how much time remains.  Inform speakers that you will be doing this, so they are not surprised during their presentation. Be prepared to politely break in if the speaker runs over time. Make sure you have left time for questions and comments. Have someone assigned to call on people with questions. End question and answer periods firmly, even if it means ending when there are still questions.  Have someone on hand to remedy problems, act as a runner, or answer general questions, as needed.  Direct people on to

their next session, where applicable.  Plan for adequate break times and meal times. At the end of the session before these breaks, give clear instructions about the amount of time, location of refreshments, and the starting time of the next session. If people are on their own for lunch, refer them to the list of restaurants in their packets.

**To end the program**

At the end of the program, conclude with a summary, a thank you, and any final instructions about follow up to the program. If there is an evaluation form, ask attendees to fill it out. Provide multiple locations where the form can be submitted. Continue to provide assistance to anyone who needs it. Do not plan to dash out of the building the minute the conference ends.  Collect evaluation forms, extra handouts, and any items which do not belong to the facility. Have people assigned to visit every room used, to retrieve materials and to pick up any stray items which might have been left by attendees. Try to leave the facility in good shape. Those who clean the building will appreciate it. Thank your speakers and escort them to their hotels or their transportation as needed.

## STAGE FOUR: AFTER THE PROGRAM

If you promised to post information on your web site, do so as soon as possible after the program.  Send thank you letters to your speakers, to your local host, and to your program committee.   Compile and summarize the program evaluation, and distribute the results as needed.   Pay all bills, including speaker fees.  Think about what went right and what went wrong and write it down for future reference.  You never know when you will have to plan another event!

**Conclusion**

Planning a conference, workshop or program is a complex undertaking. There are many small details to attend to. If those details are overlooked, the success of the undertaking may well be compromised. The goal for the planning committee should be to be invisible and unremembered. You want your audience to pay attention to the program's content, and not its mechanics. Time spent in preparing, rehearsing, and anticipating what people are likely to need will be time well spent. The mark of a successful event is that attendees remember the speakers and what they had to say, not the registration process and how long it took.

Following the guidelines listed above will go a long way towards creating a memorable program for your colleagues.