CHLA/ABSC

Workshop Planning Manual

For

Face-to-Face & Online

Continuing Education

May 2012

Introduction

Professional development is an ongoing process that comprises the sum total of formal and informal learning experiences throughout one's career. CHLA/ABSC members consistently point to continuing education (CE) as a top priority that provides opportunities for professional growth. A CE course can be delivered face-to-face or online and can range from one-hour sessions to a course lasting several weeks.

CHLA/ABSC chapters are the primary providers of CE opportunities for the membership and are instrumental in the development, facilitation, and organization of activities designed to enhance professional performance and personal growth. In addition, CE workshops are a good source of revenue for both the chapters and the Association.

This manual is designed to be a comprehensive guide for chapters to plan, promote, and deliver a successful workshop. It also includes forms and procedures necessary for the Board's records including the accreditation application and reimbursement form.

Topic and Speaker Selection

The selection of a topic and speaker often go hand in hand, particularly if there is an established expert in a particular subject area. It is not important whether you identify the speaker or the topic first; your reasons for presenting a particular workshop should be compelling and clear. The subject needs to be informative, topical, practical, and above all applicable to the needs of the participants.

Select a topic

A workshop should provide fresh ideas and current topics relevant to the targeted participants. How do you determine what topic to pursue?

- survey, formally or informally, your chapter members
- [contact the CHLA/ABSC CE Coordinator](#) for national survey results identifying the topics selected as most important/relevant to the membership
- peruse the [CE roster](#) on the CHLA/ABSC website for existing workshops (or for inspiration)
- note discussions on CANMEDLIB. A heavily discussed topic is usually an indication of an informational need

Select a speaker

Unless you have previous, personal workshop experience with a speaker, a speaker's qualifications should be thoroughly checked. Not all experts can effectively present a workshop and not all good speakers have the expertise you need. It is helpful to know the speaker's communication style as it can potentially impact the success of the workshop. For example, are they easy to make travel arrangements with? Are they flexible in terms of your needs? A speaker's reputation extends beyond their presentation style and their expertise. Speaking with participants from a speaker's previous workshop can provide valuable information.

You can find a speaker in a number of ways:
- personal experience
- word of mouth or reputation
- reading professional literature
- the [CHLA/ABSC CE roster](#)
- solicited or unsolicited workshop proposals

When communicating with a potential speaker, you will want to:
- discuss the proposed workshop topic
- share information about the participants and the chapter/association mandate and/or needs
- inquire about speaking fees and other expenses

- discuss features of the proposed venue

- propose options for dates and times

- discuss the accreditation process

While not mandatory, it is strongly encouraged that CE courses offered to CHLA/ABSC members be accredited by the Association. Accreditation aims to ensure a high quality of the material presented, provides additional credibility to the course offered, and adds strength to a resume or academic promotion and tenure considerations. It encourages presenters to identify learning objectives, as well as methods for audience participation and evaluation. In addition, accreditation assists individuals in obtaining funding to attend a CE course.

Planning Considerations

The length of the workshop

Normally, the subject material to be covered and the types of activities used will dictate the length of a workshop. Additional factors include participant travel time, traffic and the building hours of the facility in which the workshop will be held. When considering the length of the workshop, keep the following points in mind:

- plan time for registration and morning refreshments

- a half-day workshop should be no more than 4 hours long with two 15-minute breaks

- a full day workshop should be no more than 6 hours long including two 15-minute breaks and lunch

- participants lose focus after 1.5 hours; therefore, schedule a 15-minute break every hour and a half.

Workshop date

Planning a workshop, even if you are not the speaker, takes more time than you may think. Give yourself enough advance time to allow for sufficient planning (facility booking, accreditation application, refreshment selection, promotion, etc.). Three to four months should be ample time. Make sure to consider:

- attendance at summer workshops may be sparse given vacation and conference plans
- discuss the date with your membership to determine which potential dates will yield the highest participant rate
- work with the speaker; you may both have to display flexibility in adapting to one another's schedule
- do not promote a date until all arrangements have been confirmed (facilities, catering, travel, etc.)

Location

The location should be convenient for both the speaker and the participants and must be able to provide all the requirements set by both the speaker and the facilitator (i.e. internet access, requested seating arrangements, podium, microphone, room for catering, etc.). Technical and material requirements will be identified in the accreditation application. Keep the following points in mind:

- parking should be conveniently located; parking vouchers for participants are a nice touch
- easily accessible for those taking public transit
- air conditioning: the room needs to be comfortable
- good lighting
- good catering
- provide details and a map for all participants

Catering

Never underestimate the importance of food and drink to workshop participants. The quality of the refreshments provided can make or break a workshop regardless of the speaker or the topic. When considering catering for your workshop, note the following:

- beverages should be available prior to the workshop start time as well as throughout the workshop. Generally, coffee (regular and decaf), tea, and water are essential, while juice and soda are optional
- avoid heavy snacks throughout the workshop
- fruit and vegetable trays are always well received
- make sure you ask all participants and the speaker if they have a food allergy and discuss any dietary restrictions with the caterer
- if you are providing lunch, consider adding a vegetarian selection

Promotion

It is essential that you effectively promote your workshop using more than one method. Potential participants will hear of the workshop through multiple means and therefore are more likely to remember it; the speaker will appreciate being highlighted and marketed by an association chapter. Promotional materials can include posters, flyers, brochures, postcards, etc. The workshop should also be promoted on the chapter website, the CHLA/ABSC website, and posted to the CANMEDLIB listserv. If your chapter has a logo, use it on all promotional materials. It is also important to include the CHLA/ABSC logo for chapter-facilitated CE. The CHLA/ABSC Public Relations Director can provide the logo on request and is also an excellent source for advice on promoting your workshop. Remember to send out a reminder to all chapter members a couple of days prior to the workshop.

Attending to the Speaker

You have been in relatively close contact with the speaker over the past several weeks working out details and making arrangements. It is extremely important that the speaker is

made to feel welcome, comfortable, and appreciated. There are numerous ways to do this, not the least of which include:

- if the speaker is travelling by air or train, find out his/her arrival time and arrange to meet him/her to bring them to the hotel or meeting location
- if the speaker will be in town overnight, offer to make dinner arrangements with some of the chapter members
- have a welcome card placed in his/her hotel room prior to check-in
- provide the speaker with all the appropriate forms and documents (e.g. expense reimbursement, CE course accreditation certificate)
- introduce the speaker at the beginning of the workshop by mentioning highlights from his/her biography and information you may have discovered when researching his/her experience. Double check the information with the speaker prior to the introduction as it would be awful to relay incorrect information.
- thank the speaker at the end of the workshop on behalf of the participants, chapter, and association.
- send a thank-you note a few days after the workshop
- send the speaker the results of the evaluation forms.

Registration and Administration

Allow time prior to the start of the workshop for participants to register and to ensure that the speaker has everything she/he needs. The facilitator should arrive 15 minutes prior to registration to set-up and to make personal contact with the staff assigned to provide services to the room. Make sure you have thought of:

- name tags
- handouts
- promotional material (if you can)
- an agenda
- receipts
- parking vouchers
- signage to lead participants to the room

- paper and pens/pencils for all participants

- water for the speaker

- check all technical requirements to ensure they are working appropriately

- accreditation certificate for the speaker (the participants will receive theirs at a later date)

- evaluation forms

Follow-up

You've done it! The planning paid off, the speaker was great, and the participants were engaged and interested. Well done! Now you need to tie up a few loose ends and close the loop:

- send the final participant list to the CHLA/ABSC CE Coordinator so that CE certificates can be prepared. Make sure you include the name and address where they are to be sent. Normally, the facilitator will receive the certificates and distribute them appropriately.

- send completed evaluation forms to the CHLA/ABSC CE Coordinator

- write a thank-you note to the speaker

- ensure that you have received an expense reimbursement from the speaker. Send this to the CHLA/ABSC Chapter Treasurer as soon as possible to ensure prompt payment

- take down all signage and promotional material as it is now out of date

- write a thank-you note to the appropriate representative of the facility in which your workshop was held

- email handouts and/or PowerPoint slides, if applicable, to participants. If the speaker agrees, you may also email the documents to those who were unable to attend

Online Continuing Education

When offering online CE, much of the previous information still applies. You will still need to select a speaker, choose a date (when applicable), promote the workshop, and follow-up. Depending on how the workshop is being delivered, you still may need to book a facility and arrange for catering, though it is less likely that all participants will be required to be in the same place to attend the workshop when it is offered online.

In 2012, CHLA/ABSC created general guidelines for the planning and delivery of online CE.

Online CE will be facilitated by CHLA/ABSC and utilize the expertise and technological capabilities of the chapters. A list of technologies available to help facilitate online CE delivery will be developed and maintained by the CHLA/ABSC CE Coordinator through consultation with chapters and applicable institutions. Whenever available, CHLA/ABSC will pair chapters and instructors with locally available technologies.

The CE instructor is responsible for:
- o Course content and delivery
- o Completion of Part II of the CE Accreditation Application

The chapter or institution is responsible for*:
- o Providing access to a technology that ensures equitable access for all participants
- o Completion of Part I of the CE Accreditation Application
- o Technical support and trouble-shooting
- o Local promotion as required
- o Liaise with CHLA/ABSC CE Coordinator as required

* Note that if the instructor chooses not to utilize chapter or institutional facilitation, then the instructor is responsible for the above.

CHLA/ABSC is responsible for:

- o Course accreditation
- o Registration and payment processing
- o Maintenance of participant list
- o Provision of certificates of participation as required
- o Promotion on the CHLA/ABSC website and listserv
- o Distribution of online course evaluation forms
- o Payment/honoraria to instructor (as established by the chapter)

When participants are charged a registration fee, the Chapters and the Association will share the proceeds from registration. It is recommended that the Chapters will receive 75% of the total proceeds and the Association receive 25%. Alternative arrangements may be presented to the CHLA/ABSC Board of Directors for consideration and approval.

Funding Opportunities

Chapter Initiatives Fund

The CHLA/ABSC Chapter Initiatives Fund was approved at the 2002 Pre-Conference Board meeting, as a merger of two existing and complementary funds – the CHLA/ABSC Development Fund and the CHLA/ABSC Tenth Anniversary Award.

The CHLA/ABSC Chapter Initiatives Fund is intended to support and recognize special initiatives, activities, programs or projects undertaken by CHLA/ABSC Chapters, which further the mission of CHLA/ABSC. This fund provides a tangible way for the Association to foster member development at the local or regional level.

Professional Development Grant

The CHLA/ABSC Professional Development Grant was created in June 1996 at the time of the Toronto Pre-conference Board of Directors Meeting. The purpose of the Professional Development Grant is to enhance access to professional development opportunities for individual CHLA/ABSC members.

Rural and Remote Opportunities Grant

The Rural and Remote Opportunities Grant is intended to support continuing education activities to benefit members in rural or remote communities. In this context, "Rural and Remote" means geographical locations which have insufficient resources - human and/or facilities - to meet the CE needs of the health library community.

CE Development Funding

CHLA/ABSC has allocated funding in its budget to be used to assist members in developing continuing education. Inquiries should be made to the CHLA/ABSC CE Director.

Timeline Checklist

3-4 months prior to CE

- ☐ Discuss potential topics and speakers with chapter executive or membership
- ☐ Identify topic
- ☐ Identify speaker
- ☐ Identify potential dates
- ☐ Contact speaker
- ☐ Confirm date and time
- ☐ Book facility*
- ☐ Book accommodations for speaker
- ☐ Complete accreditation form and send to CHLA/ABSC CE Coordinator

*make sure it addresses all your technical requirements

2 months prior to CE

- ☐ Arrange catering
- ☐ Promote, promote, promote
- ☐ Open registration
- ☐ Confirm accreditation

1 month prior to CE

- ☐ Confirm/double check facility and catering arrangements
- ☐ Confirm details with speaker
- ☐ Confirm technical requirements
- ☐ Begin preparation of handouts and packets for participants

1-2 weeks prior to CE

- ☐ Check registration total
- ☐ Send final participant numbers to caterers
- ☐ Print name tags
- ☐ Gather required materials (pens, paper, etc)
- ☐ Ensure that you have the course CE accreditation certificate
- ☐ Final confirmation with presenter

Workshop Day Checklist

- ☐ Check Internet connection and other technical requirements. Are they all working? Do you have back-up?
- ☐ Registration materials (name tags, receipt books, handouts, agenda)
- ☐ Ensure seating set-up is as requested
- ☐ Speaker biography for introduction
- ☐ Parking vouchers
- ☐ Evaluation forms
- ☐ Materials for facility/catering (i.e. final payment, contract, etc.)

Follow-up Checklist

- ☐ Send participant list to CHLA/ABSC CE Coordinator for participant certificates
- ☐ Thank you note to speaker
- ☐ Thank you note to facility/catering
- ☐ Send evaluation forms to CHLA/ABSC CE Coordinator
- ☐ Send Expense Reimbursement Form to CHLA/ABSC Treasurer
- ☐ Take down signage and promotional posters
- ☐ Remove promotional information from online resources
- ☐ Send handouts/PowerPoint presentation to participants, if available