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FOR ENGINEERING AND SCIENCE

How to Organize and Run a Workshop

An exhausting, but not exhaustive, guide

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Description

A useful guide for running a workshop of any kind, including an ethics education workshop. In it, the author provides a typology of workshops, tips for groundwork and planning, and tips for running the workshop and post-workshop communications.
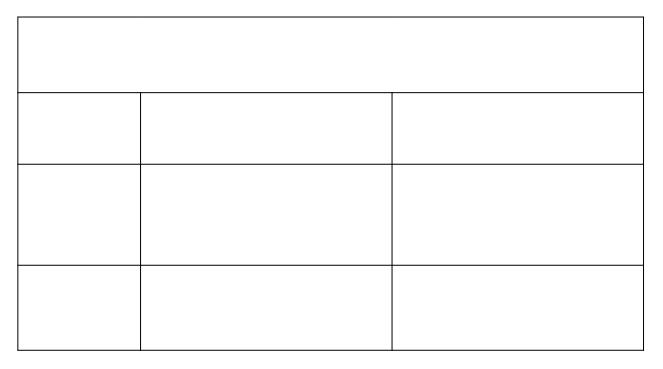
Body

An exhausting, but not exhaustive, guide.

This highly opinionated guide is based on more than twenty years of successfully organizing and running workshops. You'd do well to pay attention.

A workshop is a meeting in which people are supposed to learn practical skills. Skills are always related to knowledge, but skills cannot be taught or learned unless the students / participants see demonstrations of the skills in practice or try them out themselves.

Workshops come in four types; see table. All are governed by the same principles and organizing and running a workshop of any type requires most of the same skills

and steps. Determining which skills and/or steps can be excluded for any particular workshop is left as an exercise for the reader.

A. The fundamental principle

Respect people's time. Say it takes 30 minutes to determine the best forms of ground transportation between an unfamiliar airport and an unfamiliar university where a workshop is being held, and that it takes 30 additional minutes to write this information and post it on a Web site. If these two steps are taken by a workshop organizer and 50 people who come to the workshop learn this from the Web site, about 49 hours will be saved. Actually it's likely that even more time will be saved, because the workshop organizer is likely to be familiar with the airport and university in question.

When we consider all of the other tasks that can be done by one person to save time for 50 others, a good workshop organizer can easily save a few hundred hours for the workshop participants. There is no good excuse not to show your participants this respect.I learned this principle in the 1993 (or so) from Michael Zigmond, University of Pittsburgh, to whom I am indebted. Dr. Zigmond described this principle in the context of preparing a presentation for an academic conference, but the principle holds in numerous contexts in which one person (or a few people) expect to have the undivided attention of many more people, including, for example, theatrical productions, classes, and all public speaking events.

B. Before commitment

Ask yourself why should you go to such trouble. What do you want to accomplish? Who do you want to impress (if anyone) – the workshop's sponsors, the participants, the participants' bosses? How will you know whether you succeed or fail?

C. Groundwork

1. **Be determined to make your workshop the best.** Notice what you like and dislike about how other workshops and conferences are organized. Copy what they do well; avoid doing what they do badly.

2. **Details.** If you are not highly organized, if you don't always meet deadlines, if you can't keep track of details – in short, if you are not a perfectionist – find a perfectionist to work with you or for you.

3. **The system.** If you don't know how the system works at your institution, especially how money flows, you must learn it extremely well; get help from someone who does know it; or give up. Making mistakes with money … well, just don't. Someone who knows the system is likely to know where to turn for help, too.

4. **Supporting cast.** If you deal directly with the people who will reserve your meeting rooms, your hotel rooms, and your AV; or print your flyers and/or mail them; or make copies for you, and the like, be patient, humble, and kind. You may not know their terminology, and you need to learn it. They might not be as educated as you are, but they will know more about their job than you do. You might wind up working with these people for years – start building a positive relationship with them from the beginning. If they are on your side, your life is easier. If they are not – ugly. Very ugly.

5. **Advice.** Be sure to have three or four people who will help you think things through, share honest opinions, suggest improvements and speakers, come up with good ideas, etc. Be clear on who makes the final decisions.

6. **Foresight.** If your workshop is for people in your department, you might be able to organize, advertise, offer, and tidy up after the workshop in a month or two. If the target audience is spread across your institution or a short drive away (say 2 hours), plan on at least 3 months. If you hope to include people who will have to travel farther, start planning a year in advance. Don't be one of those people who believe

that "there is always time for another last minute" (Pratchett 1996:343).

D. Planning

1. Before making a formal announcement

a. Be sure to have funding and know how to use it. You might have to pay for meeting rooms; AV; food; travel, lodging, and stipends for some presenters; advertising; and so on.

b. Set a date – make sure you can get meeting and hotel rooms. Make sure there are no competing sporting events or religious holidays.

c. Get commitments from speakers. Don't ask anyone to make a presentation unless you know first- or second-hand that he or she is a good presenter, reasonably easy to work with, knows the material, and will stop talking when you call time.

d. Decide whether participants will be asked to do something in advance – read something, write something, introduce themselves to each other. If so, how will all of this be handled? If you distribute readings, do you need to get copyright permission?

e. Decide on the registration procedure, including data tracking. Do you need to know participants' mobility or dietary restrictions? Do you want / need to charge a registration fee (sometimes it's good to charge a non-refundable minimal fee just to make sure the registrants are serious)?

f. Formalize the details of the workshop.

g. Once you set deadlines, keep them.

2. Announce at least 6 months before the event. Send reminders as needed. The initial announcement should include

a. A description of the workshop, including its purpose, target audience(s), schedule, etc.

b. Travel directions {what's the best airport? what's the best way to get from the airport to campus (the best cab company or shuttle)? etc.}.

c. Approximate costs (workshop registration, hotel, ground transportation, food, etc.).

d. A guide to local restaurants and activities.

e. How to get from the hotel to the meeting place, including where to park (specify whether parking is free; if not, what's the cost?).

3. If there will be handouts at the workshop (PowerPoint slides, bibliographies, outlines of talks) get them printed. If they fit, put them in a folder; if not, get them bound or put them in a three-ring binder.

4. Provide name tags (in a large font) for all participants and presenters. For a one-day workshop, the stick-on-label kind is fine. For longer workshops, provide holders that with a (clip XOR pin) and a string or lanyard. Threaten participants and presenters with expulsion if they do not wear their name tags.

5. **Wear your nametag.** Set a good example.

6. Provide table tents/placards with participants' and presenters' names.

E. At the workshop

1. Introduction. The following information should be made very clear to participants. Give a more formal version to them in a handout and announce it in the first session.

a. This workshop will be run on time.

b. Please silence your portable devices.

c. Please wear your name tag so everyone can get to know everyone else. You all now know who I am, but I will wear my name tag nevertheless.

d. The restrooms can be found …

e. Please complete the workshop evaluation, which can be found …. We take the evaluations seriously and improve the workshop based on your feedback.

f. Other logistical items as needed.

2. Keep on time. If you have an 8 hour workshop with 9 timed events (an introduction, 4 substantive sessions, lunch, and 3 breaks), allowing each event to go 5 minutes over will extend the day by 45 minutes. No one will thank you for this. If

you let individual sessions go long and cut later sessions short to make up the time, you will make enemies.

Most presenters appreciate the importance of staying on time. Those who do not can at least be encouraged, and they usually acquiesce, especially if the organizer emphasizes privately and publicly her or his determination to stay to the schedule. Most participants favor staying on schedule over improvising changes.

3. Honor breaks. Participants will rely on breaks not only to use the restroom, but also to check for phone calls and e-mail. No one wants anyone else to do this during the substantive sessions, so give them the free time you promised them. In return, more of them will be back on time for the next session to start. Which you will do on time, even if some people are still in the hall.

4. Active participation. Lectures should be kept to a minimum. Participants should be encouraged to ask questions, engage in conversation, and get hands-on practice.

5. Don't rely on an active Internet connection. It isn't adequately reliable. Always have a back-up plan, and make sure your presenters do as well.

6. Amplify. Unless the room is very small or all of the speakers are known to have voices that carry, provide a microphone for the main speaker. If the room is very large, provide at least one microphone for the participants, and encourage them to use it.

7. Serve food. For any workshop longer than 90 minutes, offer appropriate portions of good food, well-labeled (to avoid allergic reactions). If lunch is served and it's possible to send menus to participants in advance, do so.

8. **Have a meaningful evaluation form.** Give participants time to complete it at the workshop or online after they leave.

F. Post workshop

1. **Process evaluations.** If the evaluation is short and there are few of them, just distribute copies to your advisory team. Otherwise, you should get someone to tally the numbers in a spreadsheet and transcribe the comments (or paste them from e-mail responses, etc.).Or do it yourself. It's important enough to spend the time. Group the comments by topic, then by respondents.

There's no point in including evaluations that have no comment in transcript – their opinions will be counted in the tally of responses.

By organizing the evaluation results this way, you will read all of the opinions on a given session all at once. By including a name or code for the respondent, you will also be able to see how a particular person felt about the workshop. If a participant has particularly useful insights, you can pay special attention to what he or she says. If another is particularly negative, and you think the negativity is generally unfounded, you can decide that he or she was just having a bad day.

2. Debrief.

When you have good reason to believe that all of the evaluations have been submitted and processed, call a meeting of your advisory team. Send them a copy of the evaluation report (with the numbers, participant comments, and any observations you want to make) and give them at least a few days to read it. Then discuss what went right, what could be improved, which speakers should and should not be invited to the next workshop.

In my experience in organizing and directing the Teaching Research Ethics Workshop When I began organizing workshops for the Poynter Center, my boss was David H. Smith, a bioethicist. After each event we would have a post-mortem. Somewhere along the way we started calling it a debrief, which I find less gruesome. for 20 years (as of 2013), the evaluations led us to make significant changes after the first workshop; fewer in the second; and still fewer in the third. When circumstances change, the design of the workshop has to change, too, and the evaluation once again plays an important part. When it is not changed much, the evaluation is likely to have less useful information, but it should still be taken seriously: You never know when you'll get a nugget of gold.

3. If presenters give you their handouts, etc., too late to distribute them, post them online if at all possible. Alert participants about their availability.

4. Send thank-you notes to all presenters. Make sure they get paid. Hassle them until you get their receipts so you can pay their travel and lodging expenses.

5. Start planning the next workshop.

G. References

Pratchett, Terry. 1996. *Hogfather.* HarperCollins Publishers Inc.

Notes

Also available at the TeachRCR.us site.

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Discipline(s)

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