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# Planning, Organizing, and Hosting a Workshop: It's All in the Details

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## **Abstract:**

A library training workshop is an effective way to teach and expand staff skills and, in the process, create interest in new library-related procedures. Hosting a workshop presents an opportunity to cultivate shared knowledge internally, and inviting outside participation provides a forum for strengthening external relationships and exchanging ideas. This article offers a detailed look at organizing a workshop—from budgeting and selecting a trainer to registering participants and making local arrangements. Additionally, it offers practical guidance for successfully planning and organizing a training workshop that will be a rewarding experience for participants, trainer, and host.

Keywords: Library workshops, Planning, NACO training

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## ***Introduction***

Libraries now exist in a constant state of evolution—library services, processes, and technologies change continually. This translates to an ever-adjusting and ever-increasing staff skill set necessary to work efficiently and effectively. Formal coursework, workplace training, one-to-one tutoring, and informal instruction or mentoring all are methods for creating and improving staff skills. Within libraries, workplace training workshops are recognized as a valuable way to develop, enhance, and supplement individual skill sets. These workshops provide information and teach skills that improve library services and/or staff efficiency and effectiveness. A well-planned and well-organized workshop will allow those attending to focus on the learning experience and gaining new skills. This article provides practical guidance for planning, organizing, and hosting a training workshop that is a rewarding experience for participants, trainer, and host.

## ***Background***

In 2005 and 2007, Albertsons Library at Boise State University successfully hosted two workshops—a NACO Training Workshop and Basic Subject Cataloging Using LCSH. Participation at both workshops was open to in-house catalogers and catalogers from across Idaho and the Northwest. The NACO training was a five-day workshop with one trainer and twelve participants who were primarily academic librarians. The LCSH training was a two-day workshop with two trainers and twenty-five participants with the majority being public library staff. In both cases, the trainers were from out-of-state and grant dollars were used to partially finance the workshops.

Although the authors had prior experience with arranging and hosting local workshops, neither had experience with organizing training at the state-level. Through organizing these events, the authors learned there is a core set of tasks important when planning a workshop, but could not find detailed, practical guidelines on ensuring all tasks are completed at the appropriate time. That information would have been very useful in planning the workshops. Informal conversation with a workshop trainer underscored that such guidelines would be useful to others as well. The insights gained through hosting these two workshops are the basis for the guidelines included here and for the checklist of tasks in the appendix. Grant writing and accounting are complex topics that will not be covered.

### *Literature Review*

A search of library science literature for information about hosting workshops revealed several articles on the training of serials catalogers using the curriculum developed and coordinated through the Serials Cataloging Cooperative Training Program (SCCTP). Many of the articles focus on the ‘train the trainer’ system for distributed delivery,<sup>1</sup> the workshop content, and discussions about the curriculum. The SCCTP’s “Guidelines for SCCTP Workshop Sponsors”<sup>2</sup> outlines the steps and time line for hosting one of its workshops including such details as: instructors, class size, costs; equipment needs and room set-up; support during the workshop; and honoraria for instructors. Similar workshop specific details are covered in “Preparing for NACO Training”<sup>3</sup> and “Basic Subject Cataloging Using LCSH: Guidelines for Workshop Sponsors.”<sup>4</sup> There is literature aimed at trainers that centers on making presentations and teaching effectively. These resources may contain informational tidbits of value for items such as room set-up and equipment. The authors were unable to find literature offering wide-ranging, practical guidance for successfully planning, organizing, and hosting a library workshop.

### *Planning*

Before deciding to host a workshop, training needs should be identified and training options should be considered. Methods for determining workplace training needs, interests, requirements, and timing include library staff gatherings; local, state, and regional library meetings; email discussion lists; one-on-one conversations; and focused surveys. Training options include ‘pre-packaged’ national or regional workshops which might meet local needs. These may be coordinated through the Program for Cooperative Cataloging, the Association for Library Collections & Technical Services, state library agencies, OCLC regional affiliates, and library associations which all have standardized training workshops that can be offered. Customized training to meet a specific need is another possibility.

Sending staff to outside instruction is an option that can be costly and time consuming, especially when several employees require the same training. Hosting a workshop in-house can be a more cost effective and timely option. Inviting external librarians to attend the workshop provides a networking opportunity and makes possible formal training previously beyond the financial reach of some. Before extending invitations, consider that pre-packaged workshops may have trainer/participant ratio guidelines or total number of participant restrictions.

Prior to starting the process of hosting a workshop securing support of local library management is vital. Library management must understand that hosting a well-run, well-attended training workshop requires time and staff resources. It is key that management encourages staff development, endorses the instruction to be provided, and recognizes the benefits of hosting a workshop. The initial request to library management should include a brief explanation of why the training is needed, a description of the workshop being recommended, and a cost estimate. A preliminary budget proposal with approximated costs listed and funding options may be required by library management. Staff in-kind costs should also be included in the preliminary budget to provide library management an estimate of how much staff time will be necessary to host the workshop. In addition to management support, administrative accounting support is essential if grant money will be used to fund the workshop. Once management support is in place, one person should be selected to provide leadership for planning, organizing, and hosting the workshop. While others may help, having a designated coordinator makes that individual responsible for the event and a point of contact for library management.

Locating and scheduling a trainer is a critical early step in the planning process. It is imperative that the trainer knows the subject thoroughly and is able to share it successfully. Pre-packaged workshops often include approved trainer registers from which to choose. Personal networks and library association meetings might spotlight a person qualified to provide the training. State, regional, and national organizations are often willing to suggest a possible instructor. Larger workshops may require, or function more effectively, with two trainers. Teams of trainers who routinely teach together may be available from the coordinating agency or found through examination of its workshop calendars. Having a nationally recognized expert in the field as the trainer may require more lead time in order to schedule the workshop.

Scheduling the workshop should take into account the needs of the target audience; the trainer's schedule; academic and community calendars; local, state, regional, and national library association meetings; and state, federal, and religious holidays. The trainer and host together decide the daily training schedule: what time to begin, what time to break, lunch time, and what time to end the day. When librarians from outside the host institution are to be invited, the workshop should be mentioned at any and all library gatherings as soon as the date is set. A general workshop announcement in a 'save-this-date' email message distributed to the target audience is also a good idea. This pre-publicity can be particularly useful when holding a summer workshop since work and vacation schedules tend to be more complicated during those months.

### ***Budget***

Once the workshop has been selected, trainer confirmed, and dates finalized, detailed financial questions and decisions come next. Workshop costs may include any or all of the following: library staff in-kind costs, trainer travel, lodging, food, local transportation; trainer fees or an honorarium; training material costs, copying, binders, dividers, and notepads; catering; facility; and/or equipment rental. Budget questions to be answered are:

- Is the host library going to cover all of the associated costs?
- Will grant dollars be used to cover some or all of the costs?
- Are participant registration fees going to be used to cover some or all of the costs? If so, what is the cost recovery point for number of registrants and what is the contingency plan if that number isn't reached?

Trainer expenses are often a large component of the workshop budget. Airfare or mileage reimbursement, lodging, local transportation, and meal costs should all be calculated. By necessity, this figure will be an estimate at the beginning. Estimates should be realistic and include a cushion for price increases. It is expected that the trainer's travel expenses to and from the host city, lodging, meals, and local transportation will be covered in full, unless custom training from a vendor has been purchased. Custom training typically includes these expenses as part of the negotiated fee.

[TABLE 1. Example of a budget for a two-day workshop held in 2007]

When figuring the registration fee, set the workshop price at a level that is affordable to the target audience and yet allows the budget to be met. If the workshop is offered on a cost recovery basis, it may be prudent for the host institution to decide that registrations will be non-refundable. If so, non-refundable registrations should be mentioned prominently on the registration form.

### ***Timetable***

Use the training date to create a calendar or timetable that includes a comprehensive, exhaustive to-do list of all the workshop tasks and follow-up. Table 2 provides guidance on setting up a calendar that includes tasks and their timing. When creating a workshop timetable, be sure to allow sufficient time both to work on, and to complete, tasks at the appropriate stage.

[TABLE 2. Example of a workshop planning timetable]

A pre-packaged workshop's sponsoring agency may have requirements and/or deadlines that should be incorporated into the calendar; for instance, SCCTP guidelines<sup>5</sup> require workshop notification so its online training schedule can be updated. When appropriate, grant application deadlines, milestones, and reporting should also be included in the time line.

Due to pre-publicity, much of the target audience should already know about the workshop by the time registration opens. In addition to the tools used to determine training needs, newsletter announcements, conference flyers, and state-wide training calendars are effective methods for communicating workshop information and details. It is important to include any workshop prerequisites or assumed participant knowledge in the pre-publicity and on the publicity flyer and registration form. Flyers or brochures shared electronically can eliminate or reduce printing and mailing expenses. For regional training, distribute the flyers and registration forms at least six to eight weeks in advance of the workshop.

### **Registration**

A workshop limited to internal staff may not require individual registrations, but library guidelines should be considered and followed. If the workshop is open to external librarians, a formal registration process is necessary for both the host and the participant. The registration form should include:

- the workshop title, date, times, and location
- an abstract of workshop content
- workshop prerequisites or assumed participant knowledge
- information about the trainer
- costs and refund policy
- registration deadline
- participant name and contact information
- host library address, phone number, and a contact person for questions
- payment method
- where and to whom the registration and payment should be sent
- participant special need or accommodation requests

When a fee is being charged, details on exactly what is included in the price should be stated clearly. The registration form may also be used to gather catering information such as beverage and lunch selections. Use of grant funding may require that particular participant data be gathered via the registration form. Including this depth of information and level of detail on the form will streamline the registration process for the host.

[TABLE 3. Example of a combined publicity flyer/registration form]

An action plan for dealing with registrations should be in place before the flyers are distributed. These issues should be addressed:

- Who is going to receive the registration forms and payments? In many libraries, only authorized staff may handle financial transactions.
- Who is going to record and track the participants? Will a waiting list be maintained?
- Are special internal practices necessary for handling money? Grant accounting often has specific protocols that must be followed.
- How will participants be informed they are enrolled or not enrolled in the workshop? Who will print receipts and how will they be distributed?
- If the maximum number of participants is reached, how will subsequent applicants be informed and registration fees returned?
- If the minimum threshold for participation is not attained and the workshop canceled, how will the registrants be informed and registration fees returned? How will the local arrangements and the trainer's travel be canceled?

- Will there be a workshop email list? If so, who will set-up and maintain the list? An email list will facilitate sharing additional workshop details.
- Is a pre-training needs assessment required or desired? Who will distribute and receive the assessments? Who will share the results with the trainer?

Sharing the workload of receiving the registrations, tracking payments, and setting-up a group email list among two or three staff members provides a system of checks-and-balances. This will ensure money is handled properly, participants are recorded, and future communication with registrants is straightforward and workable.

### *Trainer*

University or library human resource policies may consider the trainer a consultant, an independent contractor, or a temporary employee. These policies may dictate who has the authority to contact and hire the trainer. Local practice may require a formal written contract. The contract can protect both the trainer and the host institution and should outline clearly the duties and responsibilities of both parties. Institutions may have standard contracts that can be adapted for a library trainer.<sup>6</sup> Honorarium payment may require additional paperwork.

Trainer travel and hotel reservations are details that should be settled as early as possible. While either the library or the trainer may make airfare bookings and pay for flights, the host and the trainer in consultation should decide who is responsible for each. Flight reservations should be made at the convenience of the trainer's schedule. Lodging accommodations should be of good quality, convenient to the workshop location, and well-situated for restaurant access. Many academic institutions have an 'approved' list of nearby hotels. Typically, if the library is directly billed for lodging, the library must make the reservation.

When library staff makes flight and/or lodging reservations, forward a copy of the confirmation directly to the trainer. The trainer will then have airline booking information, confirmation numbers, and flight numbers; and hotel name, address, and phone information. For flights, confirmation usually contains details for electronic check-in. For lodging, an electronic confirmation often includes a web link to hotel amenities like complimentary breakfasts, fitness rooms, and airport shuttle services.

Meals and local transportation are other trainer expenses to be planned and arranged. Academic libraries frequently operate within university or state guidelines for meal reimbursement. Reimbursement may be based upon a standard per diem rate or require itemized meal receipts. The trainer will need to know which meals are included as part of the workshop, and which are outside of it, and will therefore be reimbursed separately. Local transportation can be handled in different ways. Airport shuttles or taxis provide transportation to the hotel. A rental car allows the trainer more personal mobility. If appropriate, when budgeting for a rental car, include parking costs. Host library staff can supply airport to hotel shuttle service as well as transportation to and from the workshop. Local transportation options should be discussed with the trainer and agreed upon in advance.

Meeting the trainer's flight and welcoming the trainer is a host courtesy, especially if the trainer has not previously visited the city. From the trainer's perspective, this reduces some of the end-of-flight stress and the initial worry of getting around. From the library perspective, this ensures the trainer arrives safely and is ready to conduct the workshop. The trip from airport to hotel may provide an opportunity to show the trainer the workshop facilities and to make last-minute changes.

The trainer should be informed of local protocol for reimbursing travel, lodging, meal, and transportation expenses before any reservations are made. Reimbursement guidelines and expectations should be explained fully to avoid potential misunderstanding. This is especially important if airline boarding passes, original receipts, or other documents are required for reimbursement. The time delay between a reimbursement request and payment should be part of this discussion.

An honorarium is a gift in recognition of professional service. Honoraria are standard practice when the trainer's time is given voluntarily. Based on informal information gathered in 2007 and 2008, the typical honorarium is \$75-125 per day per trainer. While class size alone should not be the sole factor considered when making the dollar

amount decision, it is reasonable that if a single trainer conducts a workshop for more than eight to twelve participants a higher honorarium be arranged. The honorarium should be given to the trainer at the conclusion of the workshop.

As the workshop develops, the host should share information with the trainer regularly. This includes the calendar and updates or changes, drafts of the publicity flyer and the registration form, the registered participant list, the results of any pre-workshop needs assessment surveys, general messages sent to the participants, and grant application and approval details when relevant. This open communication between the host and the trainer will facilitate a smooth planning and organizing process and a more successful workshop.

### ***Training materials***

A workshop often includes specific training materials. These materials are designed to support instruction and to provide the participants working tools to take back to their home libraries. A pre-packaged workshop's sponsoring agency may supply print or remote access to its training materials. In some instances, the host is responsible for supplying copies of the training materials acquired from a distributing organization such as the Library of Congress Cataloging Distribution Service.<sup>7</sup> Often the purchase price is based upon the number of workshop participants. Customized or vendor workshops usually provide information on what training materials will be available and who is responsible for printing.

If responsible for the printing of training materials, the host must comply with copyright restrictions. High quality photocopies should be made, and when copying manuals, double-sided copies are easier for participants to handle and are environmentally friendly. A table of contents and chapter dividers make lengthy manuals less difficult to use. Inclusion of blank paper or a notepad in the binder is a courtesy.

### ***Local arrangements***

Effective local arrangements are critical to pleased participants, a happy trainer, and a successful workshop. Local arrangements involve a multitude of details from trainer travel and training materials to participant parking information. The host is responsible for handling all the details and ensuring things happen on time and according to plan.

The physical location of the workshop should be decided before the registration form is designed. The setting may be inside the library, elsewhere on campus, or at a convenient facility with appropriate furnishings, hardware, and software. The physical location should be reserved, according to the facility's protocol, early in the workshop time line. For workshops held at facilities outside of the library's control, reservation of the training room may need to occur earlier in the timetable. Questions to consider when choosing the workshop location:

- Does the trainer need a computer, a projector, etc.?
- Is Internet access available? Is access wireless?
- Does the trainer need a desk, chair, podium, white board, flip chart, etc.?
- Are participants going to need individual computers and/or Internet access?
- Are work tables without computers preferred?
- Will participants be working alone and/or in groups?
- Is there adequate work space for participants?
- Are the room's furnishings and configuration such that participants can easily see the trainer and the screen, white board, etc.?
- Are the room and its furniture comfortable?

The room and its layout should be evaluated with an eye towards trainer and participant needs. The trainer should be contacted well in advance of the workshop to determine exactly what equipment and room set-up are required and desired. All changes to the physical layout and furnishings should be made prior to the workshop beginning.

Catering is often a large part of local arrangements. Typically, catering is arranged for morning and afternoon breaks and lunch. Break offerings can be elaborate or minimal. The participant audience should be considered when making food decisions. For instance, a single chocolate option is inappropriate at the break if many of the participants abstain from caffeine. It is helpful to ask participants to make beverage and/or meal selections during registration. Knowing specific choices streamlines the catering request; coffee, water, other drinks, and entrées can then be ordered in pre-determined quantities. A helpful trick is to print participant beverage and/or lunch selections on a label that is attached to the back of each name badge as a reminder of individual choices.

Lunch arrangements during the workshop may vary. Participants may be responsible for their own lunches. This often involves a longer meal break in order to accommodate transportation, restaurant, and parking time. When lunch is 'on your own,' someone from the host library should accompany the trainer. Another option is to have everyone attend a catered lunch. A catered lunch has the benefits of being ready at a specified location and time but may have the disadvantage of a single entrée choice. University libraries may have a third option to consider. Many universities have a cafeteria or other eatery that makes available a variety of entrées within a relatively short time frame. The on-campus catered or cafeteria lunch may negate the need for a longer meal break.

When the workshop encompasses multiple training days, an evening group meal might be considered. An arranged meal at a local restaurant provides an opportunity for participants and the trainer to interact socially outside of the workshop. The host should vet the restaurant prior to the event. The restaurant should have general appeal and be moderately priced. If participants will be paying separately, check ahead of time with the restaurant to see if individual guest checks can be provided. An evening gathering should be mid-way through the training; participants should be notified of this social event in advance of the workshop. A morning sign-up sheet the day of the dinner allows those interested to attend and provides time for making a reservation.

Computer generated participant and trainer name badges look professional and save time during the workshop sign-in process. The badge should have each participant's first name printed in an easily readable font. Including the participant's library affiliation on the badge will enable participants to connect with others from similar institutions. Certificates of completion for the workshop may be printed at the same time. A 'fill-in-the-blank' certificate may be part of the workshop package. If not, the library may choose to custom design a simple workshop completion certificate.

The week before the workshop, it is beneficial to communicate with all participants and the trainer. This communication should include:

- the workshop date and the time the training begins and ends
- information about training materials
- links to local and campus maps
- directions to campus and/or to the library
- parking availability and fees
- directions to the workshop location
- facility specific details—covered beverage containers, sweater recommended, etc.
- email and Internet access availability
- details about meals, snacks, and beverages
- specifics about any planned evening social event
- links for things to do in the city or area
- person, email, and phone number to which questions can be directed

It is beneficial if the trainer arrives early the day of the workshop to allow an opportunity to verify all hardware and software are online and working. The trainer should have access to the training room at least one hour before the workshop begins. Coordinating this may include arranging for entry into a building when doors are locked to the public. Arrangements should include someone from the host library greeting the trainer, providing entry into the building and training room, and handling any last minute questions or details. In the training room, items such as pointers, markers, flip charts, etc. should be placed conveniently near where the trainer will be working. In addition to any catering, extra water should be provided for the trainer.



During the actual workshop there are a number of things that can be done to make the participants and trainer feel welcome and comfortable, and ensure the workshop operates smoothly. Participants should sign-in and pickup their name badge and training materials. Beginning the training with a brief statement by the library dean or director makes the participants feel welcome. The trainer and host library staff should be introduced to the group followed by individual introductions of the participants. If more than one participant is from the host library, position them throughout the room. This allows those unfamiliar with the facility to easily ask questions of someone knowledgeable. After the greeting, details on restrooms, arrangements for breaks and lunch, and other general information should be announced. One participant from the host library should be designated to ensure things run smoothly inside the training room and to resolve unexpected problems. It is also useful to assign a host library staff person not attending the workshop to provide assistance to ensure catering runs smoothly and participant needs outside the training room are met. Computer services staff should check periodically throughout the workshop to ensure that hardware and software are operating correctly. Extra pens and paper should be readily available and candies and water placed on the tables are a welcoming touch.

### ***Evaluation***

Workshop evaluation has two components: assessment of the learning outcomes and evaluation of the workshop experience. Evaluating the workshop experience of the participants, trainer, and host offers insight into what went well and what didn't. The workshop provider may have a tool for assessing participant learning outcomes to be completed at the end of the training. The host should either incorporate the workshop experience evaluation into the provided assessment tool or create an additional questionnaire. The workshop evaluation should ask questions about the workshop curriculum, the trainer's effectiveness, the local arrangements, and offer a place for comment. Any evaluations and comments should be read by the host, shared with the trainer, and submitted to the coordinating agency as appropriate. Evaluations should be viewed by all parties as an opportunity to identify both the strengths of the training and areas for improvement at future events.

### ***Summary***

Workplace training provides a means for creating shared, common knowledge among staff. Inviting others to participate fosters networking and strengthens relationships with external librarians and their institutions. The workshops hosted by Boise State University were important to the regional cataloging community. Following the training, catalogers were more knowledgeable and effective. Participants in the Idaho NACO training workshop created or changed 1,009 name authority records between July 2005 and March 2008.<sup>8</sup> The Basic Subject Cataloging Using LCSH workshop was filled to capacity, with a waiting list, one week after registration opened. The LCSH workshop's post-training survey documented 91% of participants had an increased knowledge of subject cataloging.<sup>9</sup> Detailed and thorough planning allowed the participants and trainer to focus on the learning outcomes of the workshops and not the organizational aspects.

Finding the staff time necessary to handle the multitude of details is a challenge when planning and organizing workplace training. Simple tasks, like establishing and maintaining communication lines between host, trainer, and participants, are a time commitment. More complex tasks, such as creating the budget or handling registration, require considerable time. Finding staff time to carefully plan, organize, and attend to the many details will make the workshop experience worthwhile and enjoyable for everyone. Through it all, it is important to remember that the workshop trainer and participants are guests of the host library.

### ***Notes***

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Planning, Organizing, and Hosting a Workshop—It's All in the Details – table 1

TABLE 1. Example of a budget for a two-day workshop held in 2007

Description	Price	Count	Cost
<b>Trainer expenses</b>			
Trainer – travel to/from airport	\$35.00	2	\$70.00
Trainer – airfare	\$300.00	1	\$300.00
Trainer – hotel	\$85.00	3	\$255.00
Trainer – breakfast	\$7.50	3	\$22.50
Trainer – lunch	\$10.50	4	\$42.00
Trainer – dinner	\$16.50	3	\$49.50
Honorarium	\$350.00	1	\$350.00
<i>Trainer expenses subtotal</i>			<i>\$1,089.00</i>
<b>Training materials</b>			
Training materials	\$200.00	1	\$200.00
Trainer manual (\$.07/page)	\$45.15	1	\$45.15
Participant manuals (\$.07/page)	\$24.64	25	\$616.00
Manual binders	\$6.00	26	\$156.00
<i>Training materials subtotal</i>			<i>\$1,017.15</i>
<b>Catering</b>			
AM break (participants and trainer)	\$7.50	26 (x 2)	\$390.00
Participants – lunch	\$10.50	25 (x 2)	\$525.00
PM break (participants and trainer)	\$7.50	26 (x 2)	\$390.00
<i>Catering subtotal</i>			<i>\$1,305.00</i>
<b>Miscellaneous</b>	<b>\$100.00</b>	<b>1</b>	<b>\$100.00</b>
	<b>Subtotal</b>		<b>\$3,511.15</b>
<b>Staff in-kind cost</b>	<b>\$27.16*</b>	<b>40 hrs</b>	<b>\$1,086.40</b>
	<b>Grand Total</b>		<b>\$4,597.55</b>

\*Estimate based on:  $(\$40,000 \text{ annual salary} + 20\% \text{ variable benefits} + \$8,500 \text{ annual health insurance}) \div 2,080 \text{ hours/year} = \$27.16/\text{hour}$

Planning, Organizing, and Hosting a Workshop—It's All in the Details – table 2

TABLE 2. Example of a workshop planning timetable

<b>When</b>	<b>Action item</b>
Six months out	Request library management support Locate and select trainer
Five months out	Set workshop date(s) Prepare budget Begin workshop pre-publicity
Four months out	Select and reserve training facility Set-up internal procedures for receiving, expending, and/or returning money
Three months out	Book trainer travel and lodging Set the starting and ending registration dates Draft and finalize the registration form Set up internal process for receiving/confirming/declining registrations Plan and order catering
Two months out	Purchase, copy, and organize training materials Establish internal process for creating participant email list Distribute publicity flyer and registration form
Six weeks out	Receive and confirm registrations and print receipts Draft and finalize workshop evaluation form(s)
One month out	Request technology and equipment needs from trainer Schedule computer services support for day prior and day of workshop Assess training facility with trainer and participant needs in mind Receive and confirm registrations and print receipts Send library dean/director calendar appointment for workshop greeting

TABLE 2. Example of a workshop planning timetable (continued)

<b>When</b>	<b>Action item</b>
Three weeks out	<ul style="list-style-type: none"> <li>Close registrations; share participant list with trainer</li> <li>Email pre-training needs assessment questionnaire to participants</li> <li>Arrange for issuing of honorarium check</li> <li>Coordinate meeting special needs/accommodation requests of participants</li> </ul>
Two weeks out	<ul style="list-style-type: none"> <li>Share pre-training needs assessment questionnaire results with trainer</li> <li>Confirm catering and finalize head counts</li> <li>Print name badges and certificates of completion</li> </ul>
One week out	<ul style="list-style-type: none"> <li>Communicate with all about location, parking, email access, etc.</li> <li>Visit with trainer to confirm travel and local transportation arrangements</li> <li>Solicit and schedule registration table volunteers</li> </ul>
Three days out	<ul style="list-style-type: none"> <li>Confirm computer equipment and technology support</li> <li>Confirm welcome time and comments with dean/director</li> <li>Create any needed directional signage to locate training room</li> </ul>
Two days out	<ul style="list-style-type: none"> <li>Rearrange training room furnishings as needed</li> <li>Confirm catering counts, times, and locations</li> </ul>
One day out	<ul style="list-style-type: none"> <li>Show facility and equipment to trainer; make final changes to furnishings</li> <li>Organize training materials, badges, etc. for delivery to registration table</li> </ul>
Day zero	<ul style="list-style-type: none"> <li>Greet trainer and provide entry to training room</li> <li>Set-up registration table</li> <li>Host workshop</li> </ul>
One week past	<ul style="list-style-type: none"> <li>Review participant workshop evaluations</li> <li>Evaluate trainer's local arrangements comments</li> <li>Submit evaluation data to trainer and/or sponsoring agency</li> <li>Document host best practices and improvements for next time</li> </ul>
Four weeks past	<ul style="list-style-type: none"> <li>Confirm payment of workshop invoices</li> <li>Confirm reimbursement of trainer out-of-pocket expenses</li> </ul>

Planning, Organizing, and Hosting a Workshop—It's All in the Details – table 3

TABLE 3. Example of a combined publicity flyer/registration form

**[Workshop name]**  
[date], [time]  
[Host library], [Location]

Description: [Three or four sentences about the workshop and its content.] Participant knowledge of [cataloging] and a familiarity with [Marc] is required. [Name], a [nationally] recognized trainer, in [topic] will conduct the workshop. [Trainer name] is the [title] at the [library] in [location].

The \$[amount] workshop fee covers training materials, lunch, and breaks. Lunch will be on campus and breaks will be hosted at the [name] Library.

-----Registration Form-----

(Please **register before [date]**; limited to [#] participants)

Name: \_\_\_\_\_  
First Name for Name Badge: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_ City & Zip: \_\_\_\_\_  
Library: \_\_\_\_\_ Phone: \_\_\_\_\_  
E-mail: \_\_\_\_\_

Please circle your library division:    Academic    Public    School    Special

Beverage selection for breaks: (please circle one per break)

Morning:            Coffee            Water            Soft drink  
Afternoon:         Coffee            Water            Soft drink

Do you have special needs or accommodations requests? \_\_\_\_\_

PAYMENT: Make \$[amount] check or money order payable to: [Host library]

Pay by Credit Card

Name on card \_\_\_\_\_ Account # \_\_\_\_\_

Expiration date: \_\_\_\_\_ Type of card: Visa \_\_\_\_\_ MasterCard \_\_\_\_\_ Discover \_\_\_\_\_

Mail completed registration form and payment to: \_\_\_\_\_ [Name and address]

**Registration begins [date] and payment must be received by [date].  
NO REFUNDS unless workshop is canceled.**

Questions: Please contact [Name] at [email] or [phone number].