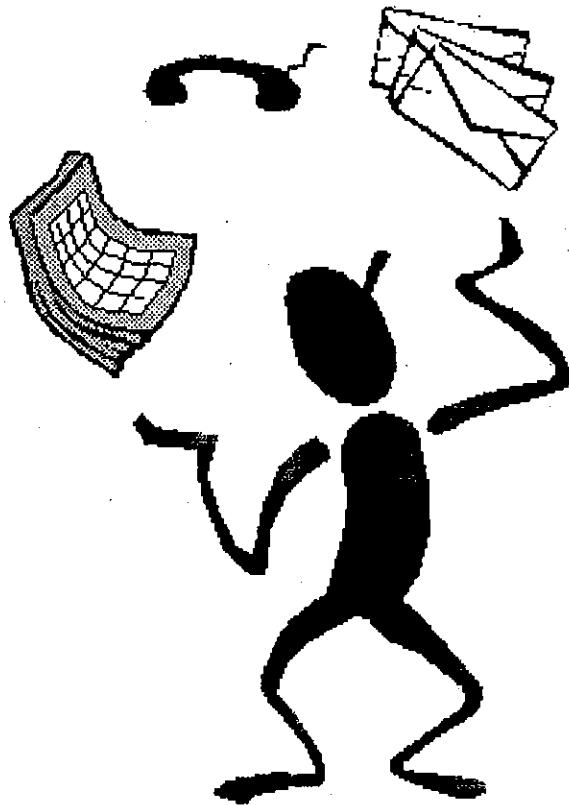


# How to Organize a Workshop

Putting together a successful training workshop has many steps. As a facilitator, you will be involved with important organizational tasks that set the stage for the workshop itself. In some situations, you may handle these tasks yourself. In others, you may share the duties with other AFS volunteers and staff. Either way, laying the proper groundwork is essential for any workshop that you are facilitating.

This guide will cover all of the necessary steps in organizing a training workshop - assessing the need for a workshop, establishing the parameters for the workshop, handling logistical concerns, recruiting and preparing participants for the workshop, and evaluating the final product. Each section of this guide provides detailed information about undertaking specified tasks. At the end of each section, you will find a checklist which summarizes the tasks that have been covered and which can be used as a tool for organizing a workshop.



# Assessing Training Needs

When asked to identify their most pressing needs, AFS volunteers and staff frequently mention training. Most volunteers and staff will say they have at some point experienced a lack of knowledge or skills necessary for handling a situation. Training is usually essential to people understanding and succeeding in the roles they have assumed. At the same time, training is not something to be rushed into without a full assessment of what type of training is truly needed.

Discuss training needs with knowledgeable volunteers and staff. When training is mentioned as an option or a solution to an issue, it is helpful to take the discussion through a process of clarification. You will achieve the best results if this process includes input from key people in the unit of the organization where training is being considered. In this way, well-founded opinions will be included from the start. People who have been included will also be more supportive of the conclusions and the real training outcomes.

Once you have decided whom to involve in the clarification process, you will want to lead or take part in detailed discussions that analyze the stated desire for training. Since training usually involves a significant investment of resources, determining the specific needs and considering a variety of solutions is time well spent. The following are useful questions:

- Who needs to be trained?
- Who is voicing the need for training?
- What is the current state of knowledge and skills among the potential trainees?
- How detrimental is the lack of certain skills or knowledge to the welfare of AFS and its participants?
- Do different people need different levels of training?
- How accessible and available are the people who need training?
- When does the training need to take place?
- What training has been attempted in the past and how well did it succeed?
- Are there other potential desirable outcomes from training other than the acquisition of skills and knowledge?
- How important is training in this area relative to other matters that need to be addressed?

Consider input from prospective trainees. Though volunteer and staff leaders may have a better overview of the training needs within AFS and may already represent the views of prospective trainees, you might also want to survey directly those people who are the intended beneficiaries of training. This process will be more time consuming, but it can help further clarify the needs and goals of training. There are two methods of collecting information from prospective trainees. The first option is distributing a written survey and collecting the information by mail or e-mail. The second option is talking to prospective trainees by phone or in person. The first option will require less time and allow people more time to reflect, but it will have a lower rate of return. The second option will take more time, but will usually provide more descriptive information. Both options will begin the

process of engaging people in their own training, which is an important step in the success of any training program. In surveying prospective trainees, do make it clear that you are not guaranteeing training for every need that is expressed. Rather, you are surveying a number of people to determine which needs are most widely shared. The following are some questions which are worth asking:

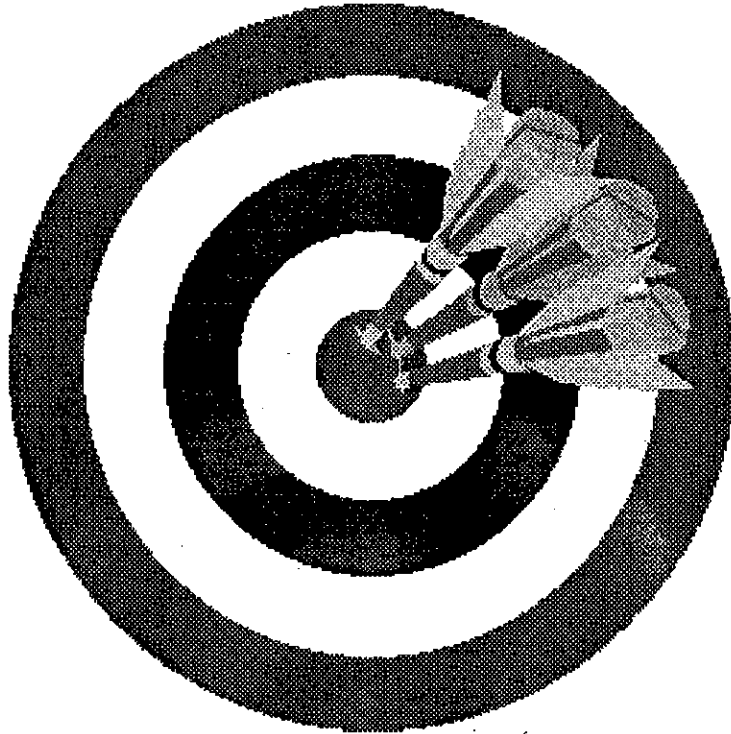
- What role or roles do you have within AFS?
- What role or roles would you like to consider in the future?
- What training, if any, have you already received?
- What training would you like to receive to help you handle the functions of your current or future AFS roles?
- Based on your experience with other volunteers and staff, what training needs are most prevalent?

Determine the training method that best matches the need. Once you achieve consensus on the both the need for and the subject of training, the next step is to decide what sort of training is most appropriate to address the issue at hand. There are several types of training to consider - mentoring, coaching, shadowing, reading, and organizing a workshop are all possible options. There are also several methods of delivering these different training options - in person, by phone, online, and by mail. . Face-to-face workshops are therefore one of several possible options available for training. Though a full discussion of all training methods is outside the scope of this module, it will be helpful to look out how different options can lead to the learning outcomes that you want and the trainees need.

The advantages and disadvantages of workshops. Workshops do have some definite advantages over other forms of training that should be considered. In an organization like AFS that is built on relationships, workshops provide an opportunity for participants to get together and get to know other people filling the same roles. The camaraderie and feelings of personal support that result from workshops cannot be underestimated. Workshops also provide people an opportunity for trainees to learn in groups, which can enhance the learning that takes place. Group settings ideally encourage interaction, multiple perspectives, and questioning, all of which may be more muted in other types of training. Group settings also allow more people to participate in training at the same, which maximizes the impact of the trainer's time. Finally, workshops are the form most people expect formal training to take, which means people often take this form of training more seriously.

There are some drawbacks to workshops too. In an organization as decentralized and dispersed as AFS, it is difficult to find a time and place where a significant number of people can participate in a workshop. The impact of a workshop therefore might be far less than some "distance learning" alternatives that can potentially reach a larger audience. Another drawback is that a workshop usually requires more organizing time on the part of the trainer and others who are helping with the event. There are several steps to organizing a successful workshop. Finally, workshops tend to have greater financial costs than most other forms of training, and these must be weighed against the benefits.

The remainder of this module will help guide you through the process of organizing a workshop if this is the training method you choose.



### Assessing Training Needs – Checklist

- Ensure that key volunteers and staff are included in the process of assessing the needs of the affected AFS organizational unit.
- Survey prospective trainees about their perceived needs, if appropriate.
- Determine what the primary needs are in the organizational unit.
- Decide whether training is the best solution to address the needs.
- Consider the advantages and disadvantages of different training methods.
- Decide if a face-to-face workshop is the best training option.

# Establishing the Workshop Parameters

Once you are firmly committed to setting up a workshop, you will be entering into a new phase of discussion. Fortunately, you will have already begun discussing many of the issues that now need resolution. In establishing the parameters of the workshop, you will need to confirm the following: what information will be covered, who will be invited, where and when the event or events will take place, and how much will be spent.

**Determine the content of the training.** What information will be covered in the workshop depends on the perceived and real needs in the organization, whether at the local, area, regional, or national level. As a rule of thumb, there will always be more information that you and others want to cover than there are resources and time available. Since the people in the organization have various levels of knowledge and skills, there are always good reasons to cover a multitude of training topics, and it can be difficult to decide which ones are most important. The process of deciding can be made simpler by creating a hierarchy of topics and covering the topic or topics at the top of the list. This does not mean that other topics cannot be covered, but they will need to be saved for future workshops or for other methods of training. Taking a utilitarian approach may help if the decision is difficult – choose workshop topics that will have the most benefit to the greatest number of people within the organization. Pay particular attention to how the training will ultimately impact the quality of the AFS experience for the organization's student, family, and school clients.

**Decide who will be invited to participate in the training.** After deciding what the subject of the workshop will be, the next step is to decide who the ideal participants are. There are several questions to consider when refining the list of people you would like to attend the workshop:

- Which people have the greatest need for training?
- Which people have the most impact on the experience of students, families, and schools?
- How many people need to be trained?
- How many people can be trained in one workshop?
- Are there certain natural geographic clusters where the people need more training than in other areas?

The answers to all of these questions will help determine which people are the primary candidates for attending a training workshop. This does not mean that other people cannot be considered for training. As with training topics, however, there are usually limited resources to cover all of the people that you would like to cover. It is important therefore to develop a hierarchy of potential trainees for each workshop so that the most appropriate people are invited to attend.

**Determine the best time and place for the training.** Choosing a geographic location and a time for the workshop can often be the most challenging decisions to make. When it comes

to location, some participants will need to spend much more time commuting than others and perhaps more than seems reasonable. When it comes to time, there are always competing events to consider, such as work schedules, holidays, school schedules, and other AFS events. In both cases, the same utilitarian standard applies – the workshop should be planned for a place and time that will accommodate the greatest number of the targeted invitees. Accomplishing this outcome does entail some guesswork because you cannot with certainty know people's schedules, willingness to travel to the workshop, and desire to participate. However, you will have the greatest potential of achieving success if you once again consult with other key volunteers and staff, each of whom may have a piece of information which helps determine the ideal location and time for the workshop.

Another time issue that you will need to decide is the length of the workshop. Some workshops last a few hours, some for a full day, and some for a weekend. Some workshops are one-time events and others are scheduled as a series. The length of a workshop is another of the factors that will influence participants' decisions to attend, so it is an important decision. The student-family liaison modules in this manual are each approximately three hours in length, so they can be presented individually or as one-day clusters or as a series, depending on what length you want the workshop to be.

Set a budget for the workshop. The final issue to be decided is how much will be spent on the workshop. Several potential costs need to be considered, including correspondence with participants, phone calls, photocopying, transportation, room rental, food and drinks, audio-visual equipment, and appreciation gifts. These costs then need to be considered in the larger context of the overall budget that the particular AFS unit has for the year. If more training workshops are to follow this one, then the cost of each workshop needs to be calculated so that a long-range training budget can be formulated. This will help determine how much any single workshop can cost. As with all of the other parameters, there should be a common agreement on the budget before proceeding.

### Establishing the Workshop Parameters – Checklist

- Discuss the list of potential training topics and determine the priorities.
- Discuss potential participants for the workshop and determine the target group
- Decide where geographically the workshop will be held.
- Decide when the workshop will be held and how long it will be.
- Establish an overall budget for the workshop.

# Handling the Workshop Logistics

Organizing a workshop involves several logistical pieces that emerge from the parameters you have established. If you are working as part of an organizing team, this is an area where other team members can contribute greatly by taking responsibility for making arrangements. As the workshop facilitator, however, it is important to be involved in the logistics, whether or not you take primary responsibility for them. Part of organizing a workshop is ensuring that all of the pieces come together smoothly so that the participants are able to learn in a comfortable and problem-free environment.

Selecting, reserving, and familiarizing yourself with the training site. The first major task is finding a site where the workshop can be held. Once you know where and when you want to hold the workshop, how long it will be, how many people will ideally be in attendance, and how much money is in your budget, you can begin the process of finding an appropriate site. There are many options to consider, including community centers, churches, schools, camps, office conference rooms, and hotel conference rooms. Each option should be considered in light of other logistical arrangements. Consider the following questions:

- How much training space will you need?
- Will you need overnight rooms? How many?
- Will you need common areas for eating and socializing?
- Does the site allow you to bring your own food?
- What facilities do you need to prepare food?
- How accessible is the site to the workshop participants?
- Will you need to arrange group transportation to the site because of location or distance?
- Is adequate and affordable parking available?
- Does the site have the audio-visual equipment that you need or will they allow you to bring your own?

You may have other specific training needs from the site, so it is helpful to write down a list of requirements before beginning the search process.

Once you have located a site, you will need to reserve it. Some sites are quite popular and may need to be reserved months in advance, so plan as far ahead as possible. Reserving a site can sometimes be a simple process involving no money or contract. In most situations, the arrangements will be more formal. Always consult with the volunteer leaders in your area and with your AFS Regional Service Center if you are asked to sign a contract, make a down payment, and provide proof of liability insurance because you are committing not only yourself but the organization when you take these steps.

After reserving the site, you will want several pieces of information for yourself and your participants - directions and a map for reaching the site, instructions for parking, and important phone numbers. You will also want to familiarize yourself with the layout of the site so that you are comfortable with the environment and can help familiarize the participants in your workshop. Know about restrooms, public phones, smoking policies,

other events taking place at the same time, and local community services such as gas stations and photocopying centers. Finally, you will want to know how you gain access to the facility on the day of the workshop, since you will most likely be training outside of regular business hours.



**Arranging overnight lodging.** For most workshops, lodging is unnecessary. In some cases though, you may want to have your group stay overnight, or you may want to offer lodging to those participants who must travel several hours to attend the workshop. There are a variety of options to consider, including rooms in private homes, hostels, camps, and hotels. You will want to weigh the following factors if you intend to provide lodging – where do you want your participants located, how important is comfort, do you want participants to have privacy or group camaraderie, and how much will it cost. Except when you are using private homes, your lodging and training site will most likely be the same location, so you can build rooms into the contract. AFS volunteers and staff are used to sharing rooms to save costs, though participants should not be asked to share beds. In any situation involving a contract for lodging, find out when you must firmly commit to the number of rooms you will need. Even if you do not fill all of the spaces in the workshop, you will typically have to pay for all of the rooms or beds you have reserved. If you are using rooms with amenities like private phones and pay-television, make arrangements with the facility to have participants pay their own costs for their use of these services. Finally, find out when participants can arrive and by what time they must leave. Most facilities will make arrangements such as extended check-out and luggage storage if the times do not coincide neatly with the workshop times.



Serving food and drinks. For a workshop of any length, it is highly recommended to provide refreshments and/or meals. The amount and frequency will vary with the time of day and length of the workshop itself. While snacks and canned drinks may be sufficient for a three-hour workshop on a Saturday afternoon, you may want to provide a meal for the same workshop held on a weekday evening after most people have been working all day. In short, the food and drink arrangements can help entice invitees to attend, can provide opportunities for socializing during a workshop, and can provide the boost of energy participants need to stay alert after a couple of hours of training. Given the relatively low cost of providing food and drinks, it is better to be generous because satiated participants are happier participants.

Handling food and drink arrangements and preparation is time-consuming. As the workshop facilitator, you will probably have difficulty focusing on the training if you also have to worry about snacks and meals. It is especially helpful to get assistance in this area, and even better to turn all of the arrangements over to someone else involved in organizing the training. If you are using professional food services such as the hotel caterer or a restaurant, the arrangements are simpler, but can still be a distraction. If your group is preparing your own food, it is imperative that someone else take the lead in handling these preparations. Keep in mind that many AFS volunteers love the opportunity to take charge of the kitchen and will gladly help out.

In handling food and drink arrangements, it is important to be thorough. In addition to the food and drinks, make sure to have plates, utensils, cups, napkins, cutting knives, salt and pepper, condiments, ice, trash bags, and other standard accompaniments that you would readily have at home. If you are using professional food services, make sure you have budgeted carefully, including taxes and gratuities. Given the diversity of eating habits, it is also important that you account for different tastes by offering a variety of options, including a vegetarian option. A variety of drinks is also important as different people prefer water, juice, sodas, coffee, and tea.

Organizing workshop equipment and supplies. While preparing the modules you are going to use in the workshop, make a list of equipment and supplies that you will need. The following items are commonly used for workshops:

- Computer equipment
- Overhead projector
- VCR and television
- Flipchart
- Dry erase boards and/or chalkboards
- Marking pens
- Chalk
- Masking tape
- Thumbtracks
- Stapler
- Paper clips
- Pens and pencils

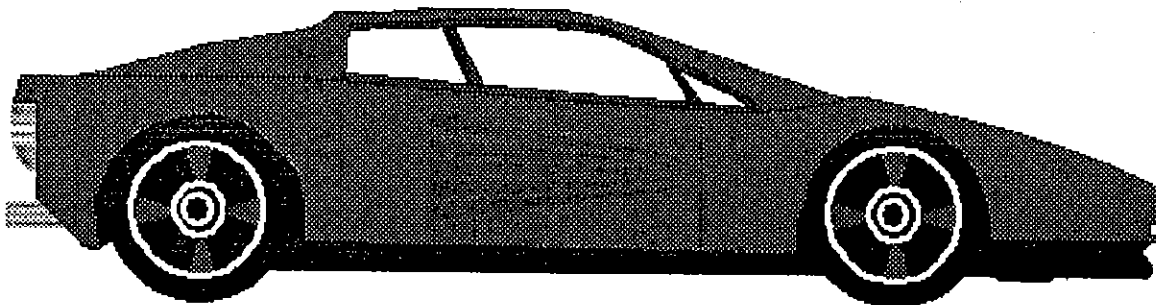
Depending on the training site, you may be able to bring in your own equipment, you may be able to use the facility's equipment free of charge, or you may have to pay for the use of the facility's equipment. In selecting your site, it is best to ask ahead of time about their equipment use policy because it can be a major expense if you are required to use and pay for their equipment, something which is common for hotels as an example.

If you plan to use more sophisticated high-tech equipment, test using it before the workshop begins. The equipment can be confusing to use when you are in the midst of facilitating a workshop and the technology does occasionally fail. Though high-tech equipment can help you make snazzier presentations, the content rather than the technology should be the central focus of the workshop. As a backup to equipment failure, do have some low-tech options that you can rely on.

It is also important to make a list of the handouts you will be using in the workshop. Plan to make photocopies at least a day in advance of the workshop to avoid mishaps with faulty copying machines. Also, make more copies than you think you will need so that all participants receive their own materials. As a contingency, know where you can conveniently make more copies if you do run out of them during the workshop.

Handling transportation issues. Most participants will drive their own vehicles or carpool to the workshop. For those who are driving, you will need to make sure they have a few simple pieces of information, including directions and a map to the training site, parking instructions, and details about any mileage or gas reimbursement being offered. If you believe carpooling will be helpful, you may also want to maintain a list of participants who have indicated they would like to share rides. You can share this information among participants as they request it.

There are occasions when participants will not be able to travel by their own car. In those cases, commercial transportation such as rental cars, buses, trains, and airplanes may be options. You and the other organizers of the workshop will need to decide how much of the budget you can allot to transportation. If you do use commercial transportation, arrangements should be made as far in advance as possible. In the case of rental cars and airline tickets, plan at least three weeks in advance to obtain the most consistently favorable rates. You will also need to decide who should take responsibility for making the arrangements, and it should be somebody who is well versed in the budgetary limits for the event. Never allow workshop participants to purchase tickets without prior approval as circumstances can change and most commercial transportation tickets are non-refundable. If participants do arrive by means other than a car, you will also want to maintain a list of scheduled arrival times and possibly assist in making arrangements for them to go from the airport, train station, or bus depot to the training site.



Managing the expenses. Once you have been allotted a specific budget for the workshop, it is important to stay within it. To start, decide how much money will need to be spent on each of the arrangements – site rental, lodging, food and drinks, equipment and supplies, and transportation. Also consider administrative expenses such as postage and phone calls. Create a written budget for the event and record expenses as they occur. This will help you monitor and adjust your budget as needed.

Funds can be obtained two ways within AFS. You can either receive an advance or you can incur the expenses and request reimbursement. Depending on who you are conducting the workshop for, you will obtain funds from a local chapter treasurer, an area team treasurer, or a Regional Service Center. In all cases, keep receipts to document what you have spent. Receipts are a necessary part of the expense report form whether you have received an advance or will be receiving reimbursement. A copy of the expense report form is included in the resource section of this manual.

Before inviting participants, you should also decide if there are expenses they will incur which you will reimburse. Typical expenses include car mileage, gas, and parking. If you plan to reimburse participants, bring extra copies of the expense report form to the workshop. After they have filled them out, you can either reimburse them with cash at the end of the workshop or send the expense form to the appropriate financial manager, who will in turn send reimbursement checks to the participants.

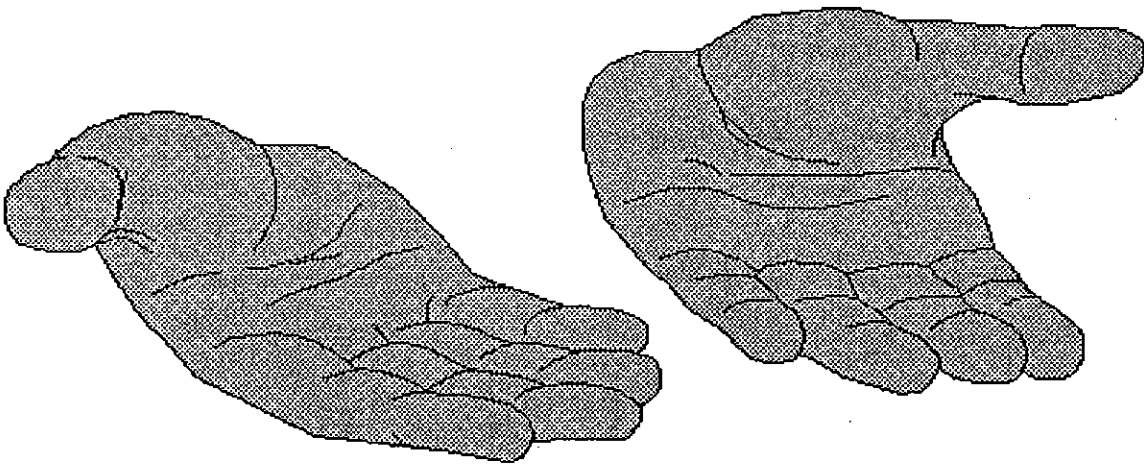
## Handling the Workshop Logistics – Checklist

- Reserve a training site that meets the needs of the workshop and familiarize yourself with the services and layout of the site.
- Arrange overnight lodging for participants, if necessary.
- Consult with volunteer leaders and staff if you need to sign a contract, make a down payment, or offer proof of liability insurance for the site and/or lodging.
- Determine what food and drinks need to be provided at the workshop and who will handle these arrangements.
- Make a list of equipment and supplies needed for the workshop, make arrangements to have them at the site, and test the equipment before the workshop begins.
- Determine how people will travel to the site and ensure that participants who need special travel arrangements receive personalized assistance.
- Consult with the unit's financial officer to establish a detailed budget, a process for monitoring expenses and collecting receipts, and a procedure for reimbursing yourself and workshop participants.

# Recruiting and Preparing the Participants

All of the decisions and arrangements you are making are on behalf of participants whom you hope will attend the workshop and gain the maximum benefit from being there. In order to accomplish the central goals of any workshop, you and the other organizers will need to take time to recruit and prepare the participants. Through good communication, you will ideally entice the participants enough to attend the workshop and create a clear picture of the workshop's intended goals and outcomes.

**Ensuring that invitees become trainees.** Once you have a list of potential participants, the starting place is a formal invitation to attend the workshop. If you surveyed your target group as part of the assessment process, you may have already established some desire for the workshop. Beyond that, a well-designed invitation will spark interest in the subject. In the invitation, let the invitees know that they have been specially chosen to attend and portray the workshop as an opportunity for personal learning and growth. There are items which you can include in the invitation that will help towards these ends, such as a hand-written note encouraging an individual to attend, a testimonial from a previous workshop participant, "teasers" on the topics to be covered, and information about the social opportunities surrounding the workshop. The more appealing the opportunity seems, the more likely it is that the individuals you want to attend will.



The invitation should also be very clear about the logistical details of the workshop. Participants want to know specifics such as who has been invited, when and where the workshop will be held, what food is being offered, who will be facilitating the workshop,

how to RSVP, and who to call if they have questions. Including these details will convey a message that the workshop is well-organized and will reduce the potential for confusion and frustration. Sending the invitations well in advance (approximately six weeks) is another detail that will show the professional level of organization behind the workshop and allow people enough time to make plans to attend.

After the invitations have been sent, you will increase attendance by initiating follow-up phone calls and e-mails encouraging people to attend. Other volunteers and staff can be very useful by calling people they know personally to encourage them. Sending a reminder postcard to those who have not sent their RSVP is another way to increase attendance since many potential participants will put the invitation in a pile and forget to return to it. If high attendance is an important goal, then it is worth the time to do some follow-up.

**Preparing participants to expect what you plan to deliver.** For those who do commit to attending, you will want to make sure that they fully understand what the workshop is about. One of the greatest detriments to the success of a workshop is an unfulfilled expectation. If the initial invitation does not fully convey the topics that will be covered and the participants who have been targeted, you may want to send follow-up correspondence such as a final agenda or some brief background reading. Not only will this help ensure that all of the participants are on the same page, but it will help remind people to attend the event.

### **Recruiting and Preparing the Participants – Checklist**

- Create and send enticing and personalized invitations for the workshop.
- Follow up on invitations with phone calls, e-mails, and reminder cards.
- Create accurate expectations among participants with detailed agendas, information about fellow participants, and background reading materials.

# Evaluating the Workshop Organization

An important and often overlooked step of organizing a workshop is evaluating it when it is over. In order to improve the next workshop, it is helpful to analyze the successes and difficulties just experienced. This remains as true for people who are experienced at organizing workshops as it is for those who are new to the process.

A good evaluation will contain feedback from everyone involved in the workshop. As the facilitator, your own feedback is important, especially because you have been involved in all phases of the organization. Other staff and volunteers who helped should be encouraged to give their feedback, whether they had a narrow or a broad role. Finally, a good participant evaluation will include questions about the organization as well as the content and delivery of the workshop. In all cases, feedback may be either written or verbal or a combination of the two. For participants, build the evaluation into the workshop agenda so that it is not forgotten. For yourself and other organizers, seek out feedback after the participants have left or at a later time when people have had a chance to reflect. Encourage everyone to suggest solutions or alternatives when they are identifying organizational difficulties as this will increase the usefulness of the evaluations.

To help in the evaluation process, sample evaluations are included in each of the training modules in this manual. Compiling these evaluation forms along with verbal feedback you receive will help leave a record of the workshop. It will also help guide the direction of future workshops.

## Evaluating the Workshop Organization – Checklist

- Write down your own feedback about the organization of the workshop.
- Obtain written and/or verbal feedback from the workshop participants.
- Obtain written and/or verbal feedback from other people who helped organize the workshop.
- Summarize the feedback for a final evaluation.