



OLA WORKSHOP PLANNING GUIDE

Oklahoma Library Association
Continuing Education Committee

Created May 1990
Latest Revision March 2018

Credits

The OLA Continuing Education Committee's Workshop Planning Guide Revision Subcommittee was responsible for preparing this guide prepared in May 1990. Members of the Subcommittee were: Dell Hewey, Chair; John Cochenour, Andra Lupardus, and Jean Mackey.

The December 1995 Revision was prepared by Kathy Barnes, Ginny Dietrich, Mary Moroney and Barbara Ray.

The May 2006 Revision was prepared by Cathy Van Hoy, Diana McMahan and Pat Williams.

February 2010 Revision.

The November 2016 Revision was prepared by Jenny Bodenhamer, Kay Boies, Jackie Kropp, Tabitha Manners, Emyrs Moreau, April Miller, Becca Pesicka, and Rebecca Weber.

March 2018 Revision was completed in conjunction with the OLA Handbook Revision by Michele Seikel of the Constitution and Bylaws Committee.

INTRODUCTION

Continuing education activities provide one of the major benefits of membership in the Oklahoma Library Association. Workshops form an important continuing education opportunity for the membership and are especially important for the certification process for public librarians. Workshops also are one of the major sources of income for OLA and are thus necessary for the continued operation of the association. OLA support and encouragement of such activities is clearly stated in the Continuing Education Section of the OLA Long Range Plan:

Goal:	The Oklahoma Library Association will encourage the educational and professional development of Oklahoma librarians and library employees.
Objective 1:	Facilitate the use by the leadership of OLA Divisions, Roundtables, and appropriate committees of the OLA Guide to Program Production as included in the OLA Handbook. Responsibility: Continuing Education Committee Timeline: Continuous, to begin July, 1995
Objective 2:	Recommend review and revision of the Workshop Planning Guide as included in the OLA Handbook. Responsibility: Continuing Education Committee Timeline: Revision in place every even year.
Objective 3:	Ensure that a designated time at the Leadership conference be provided for study of the Workshop Planning Guide as included in the OLA Handbook. Responsibility: OLA President Timeline: 1996 Leadership Conference and continuing
Objective 4:	The Continuing Education Committee facilitates the determination of needs and presentations. This includes maintaining the rotation schedule for workshops. Responsibility: Continuing Education Committee Timeline: Continuous to begin July 1995 with assessments to be completed by May of each following year.
Objective 5:	Encourage the granting of continuing education credit, staff development credits, or college credit, where applicable for participants in OLA's continuing education events. Responsibility: Continuing Education Committee Timeline: Continuous
Objective 6:	Encourage the offering of workshops in different regional locations throughout the state. Responsibility: Division, Roundtable, and appropriate committee chairs Timeline: Continuous
Objective 7:	Affiliate with other organizations which offer additional opportunities for library staff training and development and make OLA membership aware of these opportunities. Responsibility: OLA President Timeline: Continuous

The Executive Board of the Oklahoma Library Association requires all OLA committees, divisions and roundtables planning CE activities to confer with the Continuing Education Committee and its appointed CE Consultant in conjunction with the Marketing Committee Liaison for planning assistance prior to submitting program plans for OLA Board approval.

ROLE OF THE CE CONSULTANT

A Consultant from OLA's Continuing Education Committee will assist your committee, division or roundtable in many aspects of your program production. Contact the Chair of the Continuing Education Committee to have a Consultant assigned to your planning team. The designated Consultant will attend all of your program planning sessions and will share expertise in the following areas:

1. Determining the purpose of the program by helping you to:
 - a. State a program goal
 - b. Set objectives leading to the goal
 - c. Establish performance targets
2. Focusing on a target audience
3. Establishing a planning calendar which includes:
 - a. Program date
 - b. Publicity dates (for contacting Marketing Liaison and creating publicity)
 - c. Timetable for planning committee action
4. Developing a program format and agenda which includes:
 - a. Selection of presentation method(s) suited to topic
 - b. Appropriate timing of events (presentations, lunch, breaks, etc.)
5. Creating an evaluation tool which measures:
 - a. Success in meeting performance targets
 - b. Success in achieving program objectives and outcomes
 - c. Success in reaching program goal

The essential function of the CE Consultant is to assist your planning committee in the process of successful program production. The Consultant is not a subject specialist and does not define the intellectual content of a program. The Consultant will only assist in the structure of the program.

ROLE OF THE MARKETING LIAISON

A Liaison from OLA'S Marketing Committee will assist your division, roundtable, or committee (DRoC) with developing the marketing and promotion of your workshop. If you are unsure who your Marketing Liaison is, contact marketing@oklibs.org or review the Marketing Liaisons PDF on the DRoC Leader Resources page of the OLA website. The designated Liaison will provide assistance in the following areas:

1. Helping the workshop planning committee with identifying the most appropriate method of reaching the program's target audience
2. Reviewing any promotional materials developed by the DRoC chair or its members and making any recommendations for revision
3. Working with the Marketing Committee to produce designs needed for the program's promotional materials
4. Ensuring that any promotional materials created by the DRoC are in compliance for any associated requirements with advertising (e.g., graphics to be used on Facebook)

The essential function of the Marketing Liaison is to assist your planning committee in ensuring that the promotional materials are well-made and will be helpful in attracting people to your program. The Marketing Committee strives to match Liaisons with DRoCs whose purpose or library type aligns with the Marketing Liaison (e.g., a OKSL member on the Marketing committee is OKSL's Marketing liaison). Most importantly, The Marketing Liaison will work with the DRoC to ensure that all promotional materials are ready for immediate use once the Executive Board approves the program.

PLANNING

This section is a guideline outlining a minimum planning time frame and also serve as a planning checklist. The Appendix contains forms, examples and additional useful information.

At least 6 months of active planning are needed to hold a workshop or program. This does not include the follow-up that must be done. Throughout the process it is very important that the Committee Chair works with the CE Consultant to make sure steps are followed to ensure a smooth running workshop.

Planning Schedule

Planning schedules may vary depending on the length and complexity of the program. The following schedule is for day-long workshops or shorter programs. See the appendix for separate checklists for iCon and Mildred Laughlin's Festival of Books are available. Contact the Continuing Education chair for more information.

6 months before the program

- A. An OLA committee, roundtable, or division decides a program is needed.
- B. The Chair checks the OLA Calendar of Events with the Association's management company for possible conflicts of dates or subject matter. Reserve a date for the program and inform the CE Committee Chair to request a CE Consultant be assigned to the program planning committee.
- C. Determine co-sponsors, if any.
- D. The Chair appoints a program planning committee. If this is to be a jointly sponsored program, appoint one person to chair the planning committee. It is imperative that one person be in charge in order to coordinate activities and ensure that everything has been done.
- E. After a CE Consultant is named, inform the Consultant of program planning session dates, times, places, tasks. The CE Consultant will attend all planning meetings and assist in filling out the Workshop Planning Form, which must be submitted to the OLA Board and Certification Specialist.
- F. Contact the assigned Marketing Liaison. Inform the Liaison of session dates, times, places, and tasks. The Liaison will assist in creating promotional materials and advertising the workshop on social media.
- G. Keep records of all program planning committee actions, correspondence, and arrangements, to be passed on to the next chair of the DRoC.

5 months before the program

- A. Decide the date, place and time of the program. Confirm the date with the Association's management company. Select a site, date and time convenient for the audience you are trying to attract.
- B. Decide the goals and objectives of the program, such as:
 - 1. What will the participants be able to do that they couldn't do before the program?
 - 2. What evaluation techniques could be used to measure the objectives?
- C. Decide on a title for the program.
- D. Determine the target audience of the program and the level of the presentation (beginning, intermediate, advanced).
- E. List proposed presenters/trainers and their credentials. Contact them to see if they are agreeable and available. Find out what remuneration they require. (See Appendix 1 for OLA Policy for Payment of Honorariums and Expenses, etc.)
- F. List method(s) and format(s) to be used for the program. For example:

Personal Presentations

- a. Lectures
- b. Debates
- c. Interviews
- d. Panels
- e. Symposia
- f. Skits
- g. Demonstrations
- h. Group Techniques

Group Learning Experiences

- a. Discussions/Table Talks (see Appendix 10 Role of Facilitator)
- b. Role plays
- c. Games
- d. Simulation
- e. Lightning rounds
- f. Problem solving
- g. Case studies
- h. Brainstorming

Audiovisual Presentations

- a. Video presentation
- b. Hands-on computer demo
- c. Presentation software (e.g. PowerPoint)
- d. Distance learning methods (including Skype, chat feeds, teleconferencing, WebEx, etc.)
- e. Exhibits

G. Outline the program content.

H. Prepare a budget:

1. Determine expenses and income. (See Appendix 2 and Appendix 2a for OLA Workshop Budget Request)
2. Estimate the number of participants.
3. Establish registration fee. OLA policy requires a minimum fee set by the Executive Board for OLA members. Non-members are to be charged double the fee charged for OLA members.
4. Make sure receipts are obtained for all purchases, and forward these to the President for reimbursement (See Appendix 4 for OLA Treasurer's Authorization for Payment Form for requesting reimbursements.) Advise all planning committee members and workshop/program presenters to obtain, retain and submit receipts. Cover information about getting reimbursed.

I. Check out the site. If possible, hold a planning meeting there or nearby. Check:

1. Accessibility
2. Parking
3. Food establishments or caterers, if needed
4. Lodging, if needed
5. Acoustics of the meeting room(s)
6. Room size
7. Rest rooms
8. Electrical outlets
9. Lighting
10. Cost of use
11. Computer requirements-hardware, software, projection, internet, etc.

- J. Begin planning and preparing publicity with the help of the Marketing Liaison:
1. Ascertain deadlines for completing flyer and distributing to OLA membership.
 2. Ascertain deadlines for other publications. Contact:

Oklahoma Librarian-Editor
 editor@oklibs.org

OLA-twitter, Facebook (contact
 Marketing Liaison)
 marketing@oklibs.org
 post@oklibs.org

OK Chapter ACRL (current President)
<http://www.okacrl.org/>

Division/Committee list serve

Mountain Plains Library Association
 (current rep)
<http://www.mpla.us/about/state>

ODL website-contact Public Information
 Officer PIO/Bill Young
 Library Media Section
 OK State Dept. of Education
 2500 N. Lincoln
 Oklahoma City, OK 73105

OLA Website (Contact OLA Webmaster)
 webmaster@oklibs.org

OLA- calendar
 (contact Association's management
 association)
 ola@amigos.org

OK Special Libraries Association (current
 President)
<http://oklahoma.sla.org/>

3. Determine handouts and/or packet contents.

4 months before the program

- A. Assign program planning committee members specific tasks:
1. Program moderator
 2. On-site registration, name tags
 3. Refreshments
 4. Presentation equipment setup
 5. Packets/handouts, agenda, participants lists, etc.
 6. CEU approval/forms
 7. Write pre- and post-workshop article for Oklahoma Librarian
 8. Take photographs during workshop for OK Librarian article
- B. Develop a format and agenda, including rest or coffee breaks
- C. Develop an evaluation form (See Appendix 9 for sample form)
- D. Determine whether or not to videotape or record the program. Check on copyright requirements.

- E. Contact speakers, find out their A.V. requirements (microphone, lectern, projector, computer needs including Power Point, Internet, etc.)
- F. Prepare correspondence for speakers, confirming the terms of your agreement as to what they will do for the program, their remuneration, if any, and arrangements for their accommodation, meals, the equipment each is to provide, etc. A formal letter of speaker confirmation is to be sent for speaker signatures after OLA Board approval of your program. (See Appendix I and Appendix 6 for sample Speaker Confirmation Letter)
- G. Arrange for CEU credits. (See Appendix 5 for CEU Approval Information)
- H. Develop promotional materials for the workshop. (See Appendix 8 for examples.)

Promotional materials for workshops may include flyers, graphics, and news releases. It is recommended that sponsoring DRoC(s) work with their Marketing Liaison to determine the best method of publicizing their workshop. Promotional materials should include, but are not limited to:

1. A flyer between 8.5 x 5.5 inches and 8.5 x 11 inches including:
 - a. Title
 - b. Sponsors
 - c. Short summary of workshop goal / description
 - d. Date
 - e. Place
 - f. Time
 - g. Cost
 - h. CEUs
 - i. URL of workshop page on oklibs.org
2. A social media compliant graphic that thematically matches the workshop. All OLA workshops are added to the OLA Facebook as events, so it is recommended that graphics are in .jpeg or .png format and are a 784x295 pixels.

When developing your promotional materials, it is very important to ensure that you are not inadvertently utilizing copyrighted materials or designs. See [this guide](#) on design basics as they relate to copyright.

Budget at least \$25 for the Marketing Committee for promotion. Marketing will use this money to promote social media advertisements.

- I. Prepare paperwork for CE Consultant to Review
 1. OLA Workshop Planning Form (Appendix 4)
 2. OLA Workshop Budget Request
 3. Evaluation Form (Appendix 9)
 4. Flyer/Social Media Graphic
 5. Agenda
 6. Speaker bios

- J. Send the completed paperwork noted in section I above both to the Executive Board (via the President) and to the Certification Specialist at ODL by electronic communication.

3 months before the program

- A. Reconfirm speaker(s) and all arrangements. Send the Speaker Confirmation Letter. The speaker will sign a copy, scan it, and email it to the program chair.

- B. Distribute electronic copies of promotional materials, especially to the Association's management company and to the Marketing Liaison to post on social media.

- C. Send flyer(s) and/or news release(s) to other organizations for them to distribute to their members or to include in their publications in same electronic format.

- D. The OLA Board reviews the request. The chair or a representative from the planning committee will attend the Board meeting and is prepared to answer any questions that may arise.

2 months before the program

Review previous work and make appropriate adjustments.

1 month before program

- A. Make a second pre-program visit to the site. Hold final planning meeting at the site if possible. Check:
 1. Electrical outlets/lighting controls
 2. Public address system
 3. Room size

4. Determine room arrangement - draw floor plan for use by those setting up room; i.e. location and type of speakers table, registration table, seating, computer and A.V. equipment, etc.
 5. Location of rest rooms, public phones, etc.
- B. Finalize arrangements for:
1. Meeting place
 2. Computer and A.V. needs
 3. Speaker arrangements (travel, accommodation, meals, remuneration, equipment needs, etc.)
 4. Registration
 5. On-site checklist (sign-in sheet, pens, paper, tape, signs, name tags, etc.)
 6. Local arrangements (seating, lighting, refreshments, meals, water for speaker(s), microphones, tables, lectern, location of rest rooms, etc.)
 7. Develop a list of materials that may be required for the program:
 - a. Blackboard, chalk, eraser, easels
 - b. A.V. equipment and computer equipment
 - c. Pencils, paper
 - d. Additional tables, chairs, extension cords, etc.
 - e. Signs
 8. OLA store and/or other displays
- C. Finalize preparation of packet/handout materials:
1. Agenda
 2. List of participants
 3. Evaluation form
 4. Upcoming events related to the subject
 5. People with expertise on the subject
 6. Nearby restaurants/points of interest
 7. Bibliography
 8. CEU confirmation of attendance
- D. Prepare items for registration table:
1. Sign-in sheet
 2. Packets - include evaluation form
 3. Late registration (contact Association's management company)
 4. Name-tags
- E. Confirm which program planning committee members are responsible for:
1. Handling registrations, including late registrations
 2. Welcoming participants, making announcements
 - a. Informing participants of location of rest rooms
 - b. Reminding them to fill out evaluation forms
 - c. Announcing breaks and starting times

3. Introducing speakers
4. Keeping speakers to their allotted time
5. Gathering the filled-out evaluation forms from program participants and getting them to the CE Consultant
6. Collecting all receipts to turn in to the President immediately after the program.
7. Cleaning up after the program
8. Locking up the facility, if necessary
9. Writing a workshop article for the Oklahoma Librarian
10. Take photographs for OK Librarian article

1 week before program

- A. Double check all arrangements, reconfirm with speakers
- B. Prepare name tags

Cancellation

It is the policy of the Oklahoma Library Association that we do not cancel workshops once they have been approved by the board. In the unlikely event that a workshop needs to be cancelled, the Workshop Committee chair or the Division/Committee/Roundtable Chair must consult with the OLA President first. The President should be the one to make the final determination. (See Appendix 7)

Day of program

- A. Arrive early and check accommodations, facilities, supplies, equipment, room arrangement, room temperature, lighting, etc.
- B. Make sure everyone knows their assigned duties - program planning committee members as well as speakers, panelists, etc.
 1. Registrations
 2. Announcements
 3. Time keeper
 4. Encouraging the completion of evaluation forms
 5. Collecting receipts for reimbursement/paying expenses to be submitted promptly to the President.
 6. Clean-up
 7. Lock-up

Program Follow-Up

1 week after program

- A. The CE Consultant will review and compile completed evaluation forms. The Consultant will write a summary evaluation report based on the forms. Copies will be sent to the Association's management company, Chair of the CE committee and to the Chair(s) of the sponsoring group(s) who will keep a copy to include in the material handed on to the next Chair of the committee, roundtable or division.
- B. Write thank you letters to the speaker(s) and other volunteers.
- C. Turn in receipts to the President for expenses accompanied by a Treasurer's Authorization for Payment Form (See Appendix 4).
- D. Write an article of the program for the Oklahoma Librarian adding photographs if available and include a note about it in the annual report.

APPENDIX

1. OLA Policy for Payment of Honorariums and Expenses, etc.
2. OLA Workshop Budget Request
 - a. OLA Workshop with Affiliates Budget Request (when co-sponsoring with affiliate group)
3. OLA Workshop Planning Form
4. Treasurer's Authorization for Payment
5. CEU Approval for Workshops
6. Sample Speaker Confirmation Letter
7. Workshop Cancellation Policy
8. Sample Flyer and Graphic
9. Sample Evaluation Form
10. Role of Facilitator

Helpful Checklists (Subject to Change):

11. Workshop Checklist
12. iCon Checklist
13. Festival of Books Checklist

APPENDIX 1

**Policy for Payment of Honorariums and Expenses to Oklahoma Practicing Librarians
Who Speak at OLA Workshops and Annual Conference**

No fees or expenses will be paid to speakers or presenters at the Annual Conference who are OLA members and/or practicing librarians who work in Oklahoma. At OLA Workshops, only registration and a meal will be paid for speakers or presenters who are OLA members and/or practicing librarians who work in Oklahoma.

Adopted by the OLA Executive Board, September 16, 1988.

APPENDIX 2

OLA Workshop Budget Request

Note: This form must be submitted to the Executive Board for approval at least 10 weeks prior to the program. Please see the OLA Handbook for more information on hosting a workshop.

Name
Email
DRoC
Telephone

Program Details

Title
Date
Location
Description
Dates of Planning Meetings
Continuing Education Committee Consultant
Marketing Liaison

Anticipated Attendance

# of OLA Members	
X Registration Fee (min of \$65 for full day workshop)	\$65.00
= Registration Income	\$
# of Non-OLA Members	
X Registration Fee (min of \$130 for full day workshop)	\$130.00
= Registration Income	\$
# of Students	
X Registration Fee (min of \$30 for full day workshop)	\$30.00
= Registration Income	\$ -

Anticipated Income

	Income	Expenditures
Donations	\$	
Merchandise Sales	\$	
OLA Member Registrations	\$	
Non-OLA Member Registrations	\$	
Vendors/Exhibitors/Sponsors	\$	
Other:	\$	

Anticipated Expense

Postage		
Printing		
Publicity (including at least \$25 for the Marketing Committee)		
Supplies		
Site Fee		
Speaker (s) (fee, transportation, lodging, meals)		
Technology		
Promotional items		
Other:		
<hr/>		\$
Total Income and Expenses (before overhead/food)	\$	-
<hr/>		\$
Overhead (50% of expenses minus food)		-
Food		
<hr/>		\$
Total Expenses		-
<hr/>		
Anticipated Profit		\$
<hr/>		

Please feel free to submit further budget justification with this form.

Notes:

Last Updated: February 2018

OLA Workshop Budget Request

(To be used when co-sponsoring with affiliate group)

Note: This form must be submitted to the Executive Board for approval at least 10 weeks prior to the workshop. Please see the OLA Handbook for more information on hosting a workshop.

Name
 Email
 DRoC
 Affiliate Co-sponsoring Group
 Telephone

Workshop Details

Title
 Date
 Location
 Description
 Dates of Planning Meetings
 Continuing Education Committee Consultant
 Marketing Liaison

Anticipated Attendance (registrations through OLA only)

# of OLA Members	\$	
X Registration Fee (min of \$65)	65.00	
= Registration Income	\$	-
# of Non-OLA Members		
X Registration Fee (min of \$130)	\$130.00	
= Registration Income	\$	-

Anticipated Income (OLA only)

	Income	Expenditures
Donations	\$	
Merchandise Sales	\$	
OLA Member Registrations	\$	
Non-OLA Member Registrations	\$	
Vendors/Exhibitors/Sponsors	\$	

Other: \$

Anticipated Expense

	Expenditures (Total)	OLA %	Affil. %
Postage		\$	\$
Printing		\$	\$
Publicity (including at least \$25 for the Marketing Committee)		\$	\$
Supplies		\$	\$
Site Fee		\$	\$
Speaker (s) (fee, transportation, lodging, meals)		\$	\$
Technology		\$	\$
Promotional items		\$	\$
Other:		\$	\$
Total Income and Expenses (before overhead/food)	\$	\$	-
Overhead (50% of expenses minus food)		\$	-
Food			
Total Expenses		\$	-
Anticipated Profit			\$

Please feel free to submit further budget justification with this form.

Last Updated: February 2018

OLA Workshop Planning Form

Instructions: Complete form at least 10 weeks prior to date of program and email the first three pages to:

OLA Executive Board
Oklahoma Library Association
1190 Meramec Station Road
Suite 207
Ballwin, MO 63021-6902
ola@amigos.org

Certification Specialist
Office of Library Development
Oklahoma Department of Libraries
200 NE 18th Street
Oklahoma City, OK 73105-3298
<http://libraries.ok.gov/contact-staff/>

1. Division/Roundtable/Committee Sponsor(s): _____
2. Program Contact Person: _____
3. Address: _____
4. Telephone (Mobile): _____ (Other): _____
5. Program Title: _____
6. Date of Program: _____
7. Time: _____
8. Location (Include city, facility, room): _____
9. Cost: _____
10. Number of Participants Expected: _____
11. Target Audience (Describe the level of expertise required to participate): _____
12. Instructional Staff: _____
13. Reason for Offering Workshop: _____
14. Goal/Purpose of the program: _____
15. Learning Objectives: _____
- 16: Subject Matter and Methods (including specific times, topics, and methods): _____

17. Number of Instructional Hours: Attach a copy of the agenda.

18. Evaluation: Attach a copy of your evaluation.

19. Proposed Budget: Attach the OLA Workshop Budget Request.

20: Publicity: Attach a copy of the flyer and social media graphic to be used.

21: List the publications to which publicity will be sent:

22. Verification Statement: I, the Contact Person, confirm that I contacted my Continuing Education Committee Consultant and Marketing Liaison and used them to plan this workshop. I also contacted the ODL Certification Specialist and will send them an electronic copy of this form.

Name of CE Consultant:
Name of Marketing Liaison:
Name of ODL Certification Specialist:

23. Signature of Contact Person:

24. Date of Application:

OLA Executive Board Recommendation:

- Approved
- Pending
- Disapproved

Certification Specialist Recommendation:

- Approved
- Pending
- Disapproved

TEMPLATE FOR THE REGISTRATION WEBSITE

Please fill out this form as you would like it to appear on the website.

Title:

Sponsors:

When:

Where:

Cost:

CEUs:

Lunch:

Description:

Agenda:

Contact (Include email and phone):

Any other info:

Website will also include information concerning the registration deadline, the deadline to request for refunds, and contact information for the Executive Director to help with the registration process.

OLA WORKSHOP PLANNING FORM INSTRUCTIONS

NOTE: Special instructions correspond to line numbers on the application form. Use as much space as is needed to thoroughly complete application form.

1. DIVISION/ROUNDTABLE/COMMITTEE: The name(s) of the division(s), committee(s) and/or roundtable(s) sponsoring the program.

2. PROGRAM CONTACT PERSON: This is the person, directly responsible for this program, who will be notified of the OLA Executive Board's and the Certification Specialist's decisions on the application or who will be contacted if additional information is needed about the program.

3. ADDRESS: Include the complete address of the Program Contact Person.

4. TELEPHONE: Include two telephone numbers to best contact Program Contact Person. Be sure to include area code and extension (if applicable).

5. PROGRAM TITLE: The complete name of the program. Title should be as descriptive of the program as possible.

6. DATE: Date of the workshop.

7. TIME: Hours of workshop.

8. LOCATION: Complete the city, the facility and the specific room where the program will be offered.

9. COST: The charge to an individual librarian, minimum of \$65 for OLA members and \$130 for non-OLA members.

10. NUMBER OF PARTICIPANTS EXPECTED: Offer the most realistic estimate possible of the number of registrations you expect for this program.

11. TARGET AUDIENCE: Identify the type of participants for whom the program is planned. Also include the level of experience of the group if this is significant to the program content.
(Criteria for Approval: Has a target audience been identified and is the program designed for the target group?)

12. INSTRUCTIONAL STAFF: Include names, rationale for choice, and appropriate credentials for each instructor.

(Criteria for Approval: Do the qualifications listed for the instructor relate to the subject that will be covered?)

13. REASON FOR OFFERING WORKSHOP: Explain the method used to determine the need for this workshop.

(Criteria for Approval: Have the specific needs of the target group been assessed?)

14. GOAL/PURPOSE OF THE PROGRAM: A one or two sentence description of the goal of the entire program written from the participant's point of view.

(Criteria for Approval: Does the stated goal describe what the program will accomplish?)

15. LEARNING OBJECTIVES: Objectives are specific, measurable accomplishments that the participants shall be able to perform by the end of the program.

(Criteria for Approval: Are the program objectives specific accomplishments that the participants shall be able to perform at the end of the program? Are the objectives measurable? Do the objectives represent (a) changes in attitude and approach to the solution of problems, (b) acquisition or mastery of new knowledge or (c) the revision of outdated knowledge in specific skills, techniques and procedures?)

16. SUBJECT MATTER AND METHODS: Describe the subject matter/content of the program. Describe the instructional methods which will be employed: lecture, discussion group, group activity, practice sessions, etc. Any use of multimedia as well as types of exercises should be included.

(Criteria for Approval: Is the subject matter/content of the program described? Are the described instructional methods appropriate for the subject and the program objectives? Are the described instructional methods appropriate for the expected number of participants? Is the time allowed adequate for the number of participants?)

17. NUMBER OF INSTRUCTIONAL HOURS: Attach an agenda/outline with specific times. Instructional hours are based on the number of clock hours (50 minutes) of actual instructional activity provided in the program. Do not include registration time, mealtime; free time, coffee breaks, etc. Only the complete instructional hours should be listed.

18. EVALUATION: Include a copy of the evaluation form.

(Criteria for Approval: Is the evaluation related to the objectives of the program?)

19. PROPOSED BUDGET: The OLA Workshop Budget Request should be completed and attached.

20. PUBLICITY: Work with Marketing Committee Liaison and attach a copy of the flyer, social media graphic, news release, and/or other publicity to be used.

21. LIST OF PUBLICATIONS: Potential sources for publicity include the Oklahoma Librarian, the Library Media Section of the Oklahoma State Department of Education, the Oklahoma Special Libraries Association and the Oklahoma chapter of ACRL.

22. VERIFICATION STATEMENT: The sponsors need to use their Continuing Education Committee Consultant and Marketing Committee Liaison when planning this workshop. Consultants give insight into details of planning, and Liaisons provide assistance promoting the workshop, especially with social media. Likewise, the ODL Certification Specialist will approve this application for a workshop and assign the number of CEUs that ODL will grant to the participants. Check the box if you have contacted them and provide their names.

APPENDIX 4

OKLAHOMA LIBRARY ASSOCIATION
Treasurer's Authorization for Payment

Amount Due:

Payee:

Address:

Debit (to be completed by Treasurer):

For (detail purpose of expenditure and attach receipts):

Submitted by _____ Date _____

Committee, Division, Roundtable, etc. _____

APPROVED FOR PAYMENT

Date Approved:

President's Signature

Date Paid:

Check No.:

Treasurer's Initials:

NOTE: BEFORE PAYMENT CAN BE MADE, BE CERTAIN THAT REQUEST FOR FUNDS HAS BEEN APPROVED BY THE EXECUTIVE BOARD AND PUT INTO THE BUDGET. THIS AUTHORIZATION FOR AND ANY APPROPRIATE RECEIPTS MUST BE SENT TO THE OLA PRESIDENT.

APPENDIX 5

CEU APPROVAL FOR WORKSHOPS

OLA workshops will automatically be considered for CEU approval by submitting a completed OLA Workshop Planning Form to the Certification Specialist at the Oklahoma Department of Libraries. Upon approval, the Certification Specialist will provide the Program Contact Person with a model of the certification of attendance listing the name and date of the program and the number of CEU's awarded. The Program Contact Person will sign and distribute the certification of attendance at the workshop.

For planning purposes, 1.0 CEU is equivalent to 10 hours of instruction, and each hour of instruction is equivalent to 50 contact minutes.

APPENDIX 6

Sample Speaker Confirmation Letter
For Workshops/Programs

(Contact the Association's management company with any questions. Adapt for your program, using [OLA Letterhead](#).)

Date: _____

Dear _____:

Thank you for accepting our invitation to participate in the _____ scheduled on _____ in _____ at the _____. I believe that the terms of this contract, set forth below, accurately reflect our informal agreement.

In the event that registration is insufficient to warrant holding this workshop/program, this agreement may be terminated on or _____

(Select and revise paragraphs as needed)

As a guest of the Oklahoma Library Association, you will receive an honorarium of \$_____. The Association will provide your lodging, tax, meals, and transportation to and from the meeting during the workshop/program. Members of the Association will usually provide local transportation.

The Association also agrees to reimburse the expense of your round-trip coach airfare, not to exceed \$_____. The Association further agrees to provide private transportation to and from the airport or to reimburse the cost of public transit.

(or)

The Association also agrees to pay \$_____ which is _____ cents per mile from your home to _____, a distance of _____ miles.

The Oklahoma Library Association is prohibited by executive board order from paying for alcoholic beverages, movie channels, long distance telephone calls, room service, and other expenditures that have not been specifically identified. We regret any inconvenience this decision may cause.

It is our understanding that you will be speaking on the topic of _____ and that you will need the following equipment: _____. (microphone, lectern, phone line, etc.). In addition, you will provide your own _____ (handouts, computer, etc.).

Since we are planning to record this workshop/program, we would like your permission

to record your presentation. Please indicate your willingness by marking the following statement:

I grant / do not grant permission to have my presentation recorded.

The Oklahoma Library Association is honored that you have agreed to be with us.

Please sign this letter and return one copy within 10 days in the enclosed self-addressed stamped envelope.

Sincerely,

(Planning Committee Chair Signature)

(NOTE: be sure to include address & phone no. at which speaker can contact you.)

(Presenter Signature)

APPENDIX 7

Workshop Cancellation Policy

It is the policy of the Oklahoma Library Association that we do not cancel workshops once they have been approved by the board. In the unlikely event that a workshop needs to be cancelled, the Workshop Committee Chair or the Division/Committee/Roundtable Chair must consult with the OLA President first. The President should be the one to make the final determination.

If the workshop is to be cancelled, these steps must be followed to notify any who have registered or are planning to register by the Association's management company and/or the division/committee/roundtable.

- A. Notify all registrants of the cancellation by personal phone call
- B. Also notify all registrants by e-mail
- C. Notification by Division or Committee list serve, if available
- D. Notice on the OLA website
- E. Notification of the cancellation on the OLA calendar
- F. Notification of cancellation on Facebook & Twitter

Example Flyer:

How to Overcome Our Biases

Candid Conversations for Oklahoma Librarians

Friday, November 4

McAlester Public Library
 Map: <https://goo.gl/5qy2IQ>
 Whiteacre Room
 401 N. 2nd St.

\$ Non-members = \$130
Members = \$65
Library Science Students = \$30

.52 CEU's

10:00 - 10:30 AM
 Introductions

10:30 - 11:30 AM
 Conversation: What are biases?
 As librarians seek opportunities to serve the public, we need to address our prejudices. During this workshop we will look at some of the unconscious views that we all have regarding "other" groups. Attendees will receive tools and learn how to acknowledge, accept and diminish biases.
Suitable for all library employees.

11:30 AM- 12:30 PM
 Working Lunch: Previous Segment Cont'd
Lunch provided by Friends of the Guthrie Public Library

12:30 - 1:30 PM
 Conversation: Who do we have biases against?

1:30 - 2:30 PM
 Conversation: Why do biases exist? How can we address them? What can we learn?

2:30 - 3:00 PM
 Wrap-up and Q&A

Speaker 1
 Elisha Oliver
 Doctoral Candidate
 Anthropology/OU

Speaker 2
 Moriah Bailey Stephenson
 MA Sociocultural
 Anthropology/OU

PROGRAM SPONSORED BY SOCIAL RESPONSIBILITIES ROUNDTABLE.

OLA
 Oklahoma Library Association

Thick Descriptions
 Shared Knowledge, Different Perspectives

To Register, visit www.oklibs.org [Deadline to register is Friday, October 28]
 Questions? Call (405) 525-5100 , or email exec_director@oklibs.org

Example Graphic:

(Thematically appropriate, not text-heavy graphic, recommended)



Appendix 9

WORKSHOP EVALUATION EXAMPLE

Name of Workshop _____

1. Please indicate the type of library where you work:

- a. _____ Academic b. _____ Public c. _____ School
d. _____ Special e. _____ Other:

2. Did the title and description match your expectations of this workshop?

- a. _____ Yes b. _____ No

If NO, why not?

3. The presentation was informative and understandable: a. _____ Yes b. _____ No

4. Is there something we left out that should have been covered in this program?

5. The one activity or idea (outcome) I would like to try in my library is:

6. Sufficient opportunity was allowed for interaction between the participants and the speaker: a. _____ Yes b. _____ No

7. Other comments about this workshop?

8. Suggested topics for other workshops?

ROLE OF FACILITATOR

Your role is to ensure spontaneous and fruitful discussion. You need to respect the opinion of others, be perceptive and tactful.

A. Things to do:

- ✓ Ask group to introduce themselves
- ✓ Begin the discussion by asking a leading question
- ✓ Allow all members to participate
- ✓ Keep the group on track by injecting your own questions
- ✓ Call participants by name
- ✓ Pay attention to "body language"
- ✓ Accept the feelings and ideas of all group members
- ✓ Encourage wide participation by asking for alternative points of view
- ✓ Listen attentively to what each member has to say. Listen in such a manner that members will see that you are listening and are genuinely interested
- ✓ Pay attention to the overall group atmosphere. Don't overreact to the needs of specific individuals in the group

B. Some things not to do:

- ✓ Don't open discussion with a statement of opinion
- ✓ Don't require members to get permission to speak
- ✓ Don't require members to speak only to you
- ✓ Don't take sides or argue any issue
- ✓ Don't talk too much
- ✓ Don't embarrass any member
- ✓ Don't hog the spotlight
- ✓ Don't worry if someone in the group seems to take over your role as discussion facilitator. This is a good sign!

APPENDIX 11

OLA Workshop Checklist

5-6 months before program:

- _____ decide and secure place, date & time
- _____ inform OLA's management company & CE Committee
- _____ set title
- _____ select speakers/panelists and secure their participation
- _____ determine co-sponsors
- _____ contact Marketing liaison to help with promotion

4 months before program:

- _____ decide on format and agenda
- _____ develop evaluation form
- _____ develop a flyer / graphic
- _____ decide about lunch and set up arrangements & cost
- _____ make site visit and check
 - Electrical _____
 - Room size _____
 - Internet/computer connections _____
 - Arrangement _____
 - etc. _____

- _____ 8 days before OLA Board monthly meeting, complete and send in electronic format to OLA's management company and Certification Specialist at ODL
 - OLA Workshop Budget Request _____
 - OLA Workshop Planning Form _____
 - Flyer _____
 - Graphic _____
 - Evaluation _____
 - Agenda _____
- _____ present to OLA board

1 month before program:

_____reconfirm site & make second visit if necessary

_____contact & reconfirm speakers and arrange for:

travel

pick-up

meals

equipment

remuneration, etc.

_____collate packets (CEU certificates, handouts, evaluation, agenda, etc.)

_____decide on moderator or presenter from committee/roundtable/division

Day of program:

_____arrange room, get speaker, check supplies, equipment,
temperature, lighting, etc.

_____registration

_____packet

_____pencils, pens, paper

_____name tags

_____clean-up

Flyer Checklist:

Flyers used for publicizing the program must include the following information:

_____title

_____sponsors

_____short summary of workshop goal / description

_____speakers & bios (as needed)

_____date

_____place

_____time

_____cost

_____CEUs

_____ URL of workshop page on oklibs.org

Graphic Checklist

Graphics used for publicizing the program must abide by the following requirements:

_____ meets size requirements (.jpeg or .png format / 784x295 pixels)

_____ does not utilize copyrighted material

_____ not text-heavy

APPENDIX 12

iCon Checklist

9-12 months out:

- Secure location
- Organize list of potential vendors
- Start discussing potential keynote speakers
- Determine the theme/focus of the year's iCon

6-9 months out:

- Begin publicity generation
- Create social media posts and event
- Have committee solicit programs from people doing innovative work
- Select keynote speaker

6 months out:

- Put out call for program proposals via e-mail, OLA website, and social media platforms
- Determine how programs will be selected
- Make travel arrangements for keynote speaker if necessary
- Contact vendors and get commitments for booths
- Contact Marketing to have OLA store present
- Fill out OLA paperwork for the event

3 months out:

- Present iCon proposal to the OLA board
- Create program grid
- Confirm and get speaker letters from presenters
- Call venue to ensure technology needs are met
- Do a social media blast promoting keynote speaker
- Work with OLA treasurer to get speaker fees approved
- Get in touch with OU SLIS to see if they have volunteers who will work the store in exchange for registration
- Finalize vendor list

1 month before:

- Assign people to work the registration desk
- Assign someone to purchase snacks and bring them to the event
- Determine final number of volunteers needed and confirm them
- Remind Marketing about the OLA store presence
- Purchase name tags and other office supplies necessary
- Call the venue to discuss room setup, attendance figures, etc.

Day before:

- Email all committee members and volunteers their work assignments
- Gather office supplies and other items needed to be brought to the site for registration, etc.
- Call the venue just to make sure all special requests are honored

APPENDIX 13

Mildred Laughlin Festival of Books Checklist

1 year out or more

Contact everyone on your committee

- Give a list of assignments—things you need help with
- You can use a tool like sign up genius to make things easier
- You need to be in charge of arranging major things like the vendor and the authors
- You need your committee to be willing to work the day of the festival

Look for authors/illustrators

- Most have a website with their contact information/or an agents information
- You can also reach out to them through their publisher
- The sooner you have authors for the event, the sooner you can start your budget request and advertising efforts

Find a venue

- Try to find a relatively central location for the event
- Consider your estimated crowd, restrooms, set up, audiovisual needs etc.
- Contact the venue and reserve as soon as possible

Set up a book vendor

- Contact a vendor who can help you sell books
- Try to find one that will allow OLA to keep some of the profit
- Make sure they will handle ordering and returning books

Call restaurants for general pricing of food

- Food will be your largest expense besides author fees
- Don't forget beverages—at least coffee, tea, and water

Submit Budget proposal to OLA

- Budget will need the approval of the OLA executive board before you continue planning

6-8 Months out

Talk with your OLA Marketing Committee member about your marketing goals and needs.

Start promoting the Conference on community calendars, with public schools, and universities as well as public libraries

- Have an online signup—allow attendees to purchase books as part of their sign up
- Make sure the festival is promoted at the OLA conference

Make flight and hotel arrangements for authors

Make review collection lists and ask committee members to check their libraries for these new books.

Use Jen's Starred Reviews to help create this list: <https://booksheets.wordpress.com/>

Design an online form for event feedback

1-3 months out

Confirm a bookseller

Confirm food reservations

Double check with venue

- _____ Finish the starred review list for the festival review collection
- _____ Touch base with your committee and any other vendors
- _____ Make sure you've assigned a person to pick up the authors the night before the event
- _____ Visit venue with at least one committee member and do a walk thru as if you were attending the event—this will help you think through any last minute needs

On the day of the event

- _____ Have someone take authors to breakfast and bring them to the event
- _____ Have a point person for each station at the event i.e. book signing, food etc.
- _____ Ask food vendors to arrive at venue at least 30 minutes before the event begins
- _____ Make sure book vendors have all they need to get set up
- _____ Keep beverages and food trays full
- _____ Allow time in the schedule for restroom breaks
- _____ Make sure attendees are given feedback form
- _____ Assign someone ahead of time for clean-up after the event