

General Guidelines for Developing and Running a Workshop

1. Conduct a Needs Assessment
 - a. Am I seeking or being sought?
 - i. Is a workshop appropriate for the venue (from local didactic sessions to national meetings)?
 - ii. What do leaders need/want to accomplish?
2. Timing [is everything!]
 - a. Schedule
 - i. How much time is allotted for the session?
 - ii. How is the session positioned within the schedule, i.e. will workshop lead into and/or follow a related session?
 - b. Location – e.g. long distance between rooms in large venues
3. Setting
 - a. Room size – will it allow for assembling breakout groups?
 - b. Seating (same question)
4. Number of participants
 - a. Is there a maximum?
 - b. If so, is there a registration deadline for participants?
5. Co-leaders/facilitators
 - a. At least 1 other person, even for small number of registrants/participants
 - b. Identify and get commitment early in the process (co-leaders should appear on the syllabus)
 - c. Have a contingency plan, especially for regional/national meetings, i.e. one person who can run the workshop in event of illness, emergency, etc.
6. Goals and objectives
 - a. Goals
 - i. In general, one overarching goal per workshop
 - b. Objectives – will be determined by needs assessment and time allotted for the session
 - i. Be realistic – better to completely achieve one or two objectives than only partially achieve many
7. Planning and structuring the workshop
 - a. Start at the end; what do you want to have accomplished at the conclusion of the workshop?
 - b. How will you get to that end?
 - c. Consider a structured format (e.g. templates on paper or slides), especially for shorter duration sessions

- d. Determine any pre-meeting work by participants [especially for focused activities, such as specialty groups assembled for a specific purpose (e.g. Milestones)]
 - i. Expect and accept that not everyone will be equally prepared
- e. Group sizes
 - i. Determined by number of participants and tasks
 - ii. Balance number of participants per group against time allotted for activities
 - 1. Large number of small groups – will need additional time for each activity to accommodate all members, and/or for report-outs to larger group
 - 2. Small number of large groups – may not allow for active engagement of all members
- f. Timing
 - i. Announce timing for all activities up front
 - ii. Give frequent reminders
 - iii. Stick to the schedule as much as possible
 - iv. Build in some degree of flexibility
- g. Plan [see suggested template] – should include at minimum:
 - i. Introduction
 - ii. Breakout
 - iii. Assignment/tasks
 - iv. Report back
 - v. Debrief/Summary
 - vi. Follow-up
- h. Facilitation
 - i. Move from table to table
 - ii. Guide, don't teach!