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!