

Helpful Hints in Planning a Conference or Workshop (Robert Skrocki)

1. Early Planning
 - a. Start a year ahead of time for a conference, three months ahead for a workshop, at a minimum.
 - b. Assemble Training Event Planning Group with Key Stakeholders who know the target audience and who have the connections to get decisions on resources made, & those with time and passion and organizational skills to do the work.
 - c. Decide on whether to organize it as a “within a faith tradition or denomination” event, a “within an organization” event, or an “interfaith/ intercultural/ inter-organizational” event, each of which has advantages and disadvantages.
 - d. Decide on goals/ objectives/ audience for the event
2. Mid- term planning
 - a. Settle on title of Event and type of facility needed (e.g. size of room for estimated audience, one big room with round tables for discussion, workshop breakouts, audiovisual capabilities and line of sight needed, convenience of parking and public transportation access)
 - b. Choose date, time, and location of event after surveying what other conflicting events might be occurring, days of week that are likely convenient for intended audience. Send out save the date notice via email lists of coalition members.
 - c. Choose speaker(s) that might be of interest and bring new information and inspiration to the intended audience. Contact keynote speakers for availability on projected date and location. Confirm their speaker fees and travel expenses are within budget.
 - d. Contact site and put deposit down to confirm date location and food arrangements (e.g. continental breakfast, box lunches, refreshments).
 - e. Identify fiscal agent to handle monies, and empower with enough cash advance to handle deposits on site, food, etc.
 - f. Determine how you want to handle registrations (online, email, mail in, etc.) Identify registrar to handle online registrations and hold registration cash.
 - g. Set up format and levels of sponsorship and exhibitors, with benefits for each level, including complimentary registrations. Identify potential sponsors and exhibitors. (Hospitals, agencies, NAMI affiliates, funders, foundations, etc.)
 - h. Set up rough budget with estimated expenditures for site, food, audiovisual, handouts and program book, speakers fees and travel, and revenue from fees and sponsorships/ exhibitors. Estimate reasonable fee for attendees and set up process for scholarships. Get review and approval by financially responsible coalition members.
 - i. Determine types of CEUs needed for potential audience and identify coalition member to provide CEUs. The schedule and learning objectives must demonstrate the hours of direct educational contact (excludes breaks), relevance to professional clinical practice, contribution to the advancement, extension, or enhancement of professional skills/ scientific knowledge and values of the licensee, the scientific integrity of the program, the appropriateness of the teaching methods.
 - j. Create text version of the conference flyer.
 - k. Identify coalition member with graphics department or graphics skills and create visually appealing event flyer. For sponsors/ exhibitors, determine size and type of files for

