

**Workshop Planning Checklist  
Updated July 2016**

**Fall Planning Activities**

* Do you plan to hold a workshop this year? Decide early!
* If you plan to hold a workshop:
  + Do you want to co-sponsor with another IG or ALAO Committee?
  + Determine theme, location, date and presenter(s). Get confirmation from presenters as early as possible.
  + Reserve venue.
  + Share date with IG Coordinator via email. They will add date to ALAO Calendar.
* If you do not plan to hold a workshop, let the IG Coordinator know ASAP and begin to outline your IG’s activities for the year. Potential IG activities include:
  + Hosting a webinar or other online gathering for members.
  + Hosting a roundtable or informal meeting at ALAO Annual.
  + Blogging, honing, or revitalizing your web presence in a substantial way.
  + Any other creative ideas that meet your [group’s mission](http://alaoweb.org/procmanual/interestgrps.html) and needs.

**12 Weeks (Or Sooner!) Before Program**

* Send [Workshop/Meeting Proposal Form](http://alaoweb.org/resources/Documents/WorkshopProposal.xlsx) to IG Coordinator.
* Send [Activity Budget Proposal and Expense Report Form](http://alaoweb.org/Resources/Documents/ActivityExpenseReport.xlsx) to IG Coordinator and Treasurer. Remember you can pay three ways – use the ALAO credit card, pay for items yourself and request reimbursement, or request that ALAO purchase items.
* Promote “Save the Date” on social media, relevant listservs, and newsletter. Collaborate with PR Coordinator when appropriate.
* Communicate “Save the Date” information directly to ALAO members who are interested in your group (see IG Member Lists in Google and/or Membership Chair) as well as to anyone who expressed interested in your group at the ALAO annual conference.
* Send event registration ([step 1, date and page set-up](https://docs.google.com/a/alaoweb.org/forms/d/1Q9JU11MYkCjToXl4AIEt3n0yDX-MSYRXLknBVDKq6gk/viewform) and [step 2, final details](https://docs.google.com/a/alaoweb.org/forms/d/16jMObb9L4CD8hK03tpLutyeDkkZYwVRKufEMxosNl-o/viewform)) to webmaster(s) using online form (must be logged in to board-only area of ALAO site to use preceding links) or contact webmaster(s) directly. Follow up early and often to ensure timely registration set-up. Registration typically takes a week or more to set-up.
* Divide workshop responsibilities among co-chairs and planning committee members. Consult [Detailed IG Workshop Planning Guide](https://drive.google.com/open?id=1ttL-7oGbhyHL0nE2xNVgI5wNXmko-G30JBh6Vs8VDEI) (Google) for information on dealing with checks.

**8 Weeks Before Program**

* Open registration.
* Make sure the information on registration form, announcements, and IG blog are consistent. Can include link to blog (if applicable) on registration page to make updating details easier.
* Initiate arrangements with caterer, if using.
* Design a PDF flyer, if using one.
* Verify driving directions to be included in PR.
* Send PR information to PR Coordinator with release times, suggested text, including PDF flyer link. Update IG social media with workshop details.
* Confirm arrangements with presenter(s). Request presenter photo and bio for PR.

**6 Weeks Before Program**

* Promote weekly via PR Coordinator on relevant listservs and social media.
* Request giveaways, folders, emergency kit, and any ALAO loaner items from PR Coordinator.
* Photocopy all registration checks as they are received and send checks to Treasurer weekly.
* Keep copies of all receipts, bills, and contracts.
* Make sure committee registers, if attending. Register any free guests.

**4 Weeks Before Program**

* Confirm arrangements with venue—technology, parking, hours.
* Continue promotion, monitor registration.
* Develop evaluations – print or using ALAO’s SurveyMonkey account.

**2 Weeks Before Program**

* Continue promotion, monitor registration.
* Confirm committee assignments.
* Prepare print agenda, evaluation form, receipts, and other handouts.
* Purchase thank you gifts.
* Make sure attendees have good directions and are aware of parking details, if applicable.

**1 Week Before Program**

* Give final count to caterer.
* Finalize details with presenter(s).
* Purchase water, breakfast, and snack items.
* Print nametags, signage, and list of names of registered attendees.
* Assemble folders or information packets—include agenda, evaluation form, Wi-Fi password, and other handouts.
* Print list of attendees for registration table checklist, noting names of those paying by check on site.

**Day of Program**

* Double-check technology and Wi-Fi. Identify contacts who can assist on site.
* Set up signage (outdoors & entry directional signs, breakout rooms).
* Set up registration table, folders, and giveaway table.
* Make sure coffee service and morning catering is set up.
* Check off attendees as they arrive, collecting checks if needed.
* Introduce program, any housekeeping items, and introduce speaker.
* Photograph throughout day for newsletter article and IG social media, using [ALAO’s Photo Release Form](http://alaoweb.org/resources/Documents/forms/ALAO%20Release%20Form.pdf) where applicable. Utilize your IG’s Flickr or the ALAO Picasa-Google account to store. See [board restricted page](http://alaoweb.org/board_restricted) for info about the ALAO Picasa account.
* Encourage return of evaluations.
* Distribute giveaways and any door prizes.
* Distribute thank you gifts or checks to presenter(s).

**After Program**

* Along with final checks, send a complete list of everyone who has paid by check to the Treasurer when the workshop is complete.  Include the following information: attendee name, IG event name, and check number for proper record keeping.
* Duplicate receipts and submit to Treasurer with [Reimbursement Request Form](http://alaoweb.org/Resources/Documents/reimbursement_form.xls), to be compensated for expenses.
* Complete final [Activity Budget Proposal and Expense Report](http://alaoweb.org/Resources/Documents/ActivityExpenseReport.xlsx), send to IG Coordinator and Treasurer.
* Pay any outstanding expenses.
* Collect and analyze evaluations. Share with planning committee.
* Send copy of evaluation to presenter(s).
* Send thank you note with [ALAO logo](http://alaoweb.org/board_restricted) to presenter(s). (Login to board-only area of site for access to preceding link.)
* Send copy of flyer, program, and relevant print/digital material to [ALAO Archivist](http://alaoweb.org/board#appointments).
* Include a summary of workshop in next ALAO Newsletter and ALAO Board Report.
* Follow up on any potential new members.
* Request PowerPoint slides or documents from presenter(s) to include on IG blog or to send via email (with permission).
* If you used electronic evaluations, re-send link to participants and give a deadline.

**Program Points to Include on Flyers, Social Media, and Listservs**

* Title
* Abstract
* Date, time, location
* IG or committee name & ALAO (ALAO logo on print material)
* Registration fee for member and non-member
* Registration deadline, cancellation, and refund policy
* Registration contact w/phone and email
* Mailing address for checks
* Note to make checks payable to ALAO
* Driving directions
* Parking information
* Hotel information, if needed. Include discount rate and deadline, if applicable.

**Links to Relevant Workshop Planning Forms**

* [Workshop/Meeting Proposal Form](http://alaoweb.org/resources/Documents/WorkshopProposal.xlsx)
* [Activity Budget Proposal/Activity Budget Expense Report](http://alaoweb.org/Resources/Documents/ActivityExpenseReport.xlsx) (submit before and after)
* [Reimbursement Request Form](http://alaoweb.org/Resources/Documents/reimbursement_form.xls)
* [Modify a webpage or request a new webpage](https://docs.google.com/a/alaoweb.org/forms/d/1oSv6EiKYKHSqJ02SCZrgOn5zr0kHb1DibCBK88tWseQ/viewform) (must be logged in to board-only area of ALAO site)
* [PR Materials/Giveaway Request form](https://docs.google.com/forms/d/1EnUM1sjSN7dnM3FUgLpoWvHxZqiRZ2eMdTrkyCbJmsc/viewform) (must be logged in to board-only area of ALAO site)
* [Create new event page on the website & calendar entry](https://docs.google.com/a/alaoweb.org/forms/d/1Q9JU11MYkCjToXl4AIEt3n0yDX-MSYRXLknBVDKq6gk/viewform) (must be logged in to board-only area of ALAO site)
* [Finalize all details for an event](https://docs.google.com/a/alaoweb.org/forms/d/16jMObb9L4CD8hK03tpLutyeDkkZYwVRKufEMxosNl-o/viewform) (must be logged in to board-only area of ALAO site)

Updated by Katie Foran-Mulcahy, July 2016

Created by Kathryn Venditti, 2014