

Registry of Interpreters for the Deaf, Inc.
Affiliate Chapter Relations Committee

Affiliate Chapter Handbook
Third Edition
Section 4

How to Coordinate and Host a Successful Workshop
or, How NOT to Get Lost in the Details!

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How to Coordinate and Host a Successful Workshop or, How NOT to Get Lost in the Details!

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This document is designed for individuals who coordinate and host workshops and other training activities for interpreters and interpreter educators, and is intended as a set of guidelines that can be used when setting up a workshop so that the planned activity meets the needs of the intended audience. There are pre- and post-event details that must be handled, in addition to details that must be handled on-site.

This document is designed to provide the user with an outline. It will cover most situations but possibly not all. If you have suggestions or comments that would be beneficial to other coordinators, please contact us and we will consider your comments for inclusion in this document.

FORMAT:

This document is organized into four content areas: A) Logistical Considerations, B) Financial Considerations, C) Interpreting Considerations, and D) Miscellaneous Considerations. Each section includes information about Pre-event, On-site, and Post-event tasks. There will be a list of tasks under each section along with sample questions you'll need to answer in order to determine how best to achieve your intended outcome.

The order of the tasks may vary from the way they are presented in this document. There may be some overlap of tasks across the content areas. Additionally, not all areas may be needed for each workshop, but it helps to consider them, even if only briefly. Examples will be used whenever possible. Several people can work on one event at the same time, but there **MUST** be good communication between committee members.

The most important thing to remember is that there are many details that must be addressed in order to have a successful event. Planning and preparation will contribute to the event's success.

TABLE OF CONTENTS

A. Logistical considerations

1. Pre-event considerations
2. On-site considerations
3. Post-event considerations

B. Financial considerations

1. Pre-event considerations
2. On-site considerations
3. Post-event considerations

C. Interpreting considerations

1. Pre-event considerations
2. On-site considerations
3. Post-event considerations

D. Miscellaneous considerations

1. Pre-event considerations
2. On-site considerations
3. Post-event considerations

A. Logistical Considerations

PRE-EVENT

The Pre-event items are the foundation for a successful workshop. These events are not necessarily listed in the order that they need to be completed. For example, the location may be selected first even though it is listed as number X on this list. Additionally, several of these steps may be done simultaneously by different members of the organizing committee. The workshop coordinator or organizing committee members should be familiar with all these steps before moving forward.

I. Determining the audience

A task is to define the target audience.

- Is this event geared toward interpreters who work in community settings? In educational settings? In specialized settings such as legal, medical, performing arts or with Deaf-blind interpreters?
- Is it for Deaf interpreters?
- What is the desired skill level of the intended audience: beginning, intermediate, advanced?
- Is it for certified or pre-certified interpreters?
- Is it appropriate for interpreting students? Or for ASL students? Or for the Deaf community?
- Is the workshop for novice interpreters or for experienced interpreters?

II. Determining the topic

Another task is to select the topic. Asking the local interpreting community what kind of training they'd like to attend can generate ideas for workshops. This information can be obtained from evaluation forms distributed during events, or by polling the membership of the local RID chapter via mail, email or telephone.

Sometimes the presenter will determine the topic. For example, an interpreter may request a particular presenter who has a specialty area.

III. Determining the presenter

Selecting the presenter is another task. This may be done before the topic is selected or simultaneously. Sometimes the presenter will be determined by the topic. For example, an interpreter may request a particular topic, which is known to be taught by a particular person.

If a presenter is unknown to you, check with other interpreters to see if they know of this person's work and presentation style. Find out where this person works, whether as a freelance interpreter, as an instructor in a training program, or as an in-service provider. Ask the person to send you a copy of his/her resume and a list of previous workshops that he/she has taught.

IV. Determining the dates and times

Selecting the date(s) and times for the workshop is another task. Sometimes this information is pre-determined, such as by a school district or organization. When selecting dates be careful not to conflict with holidays (Easter, Passover, Memorial Day, etc.) or school breaks (three-day weekends, winter or spring break, etc.). Check more than one calendar to be sure, especially if you plan to draw participants from a wide geographical area. Consider seasonal factors such as snow, rain, or heat.

V. Determining the language of the presentation

Another task is to determine the language of the presentation. Will it be taught in ASL or English? The coordinator, the presenter or the audience may determine this. For example, if the workshop is for both Deaf and hearing interpreters at an advanced level, the workshop will probably be taught in ASL. This needs to be conveyed to the presenter to make sure he/she can accommodate this need.

Determining which language will be used may impact the need to hire interpreters. These issues are discussed in the section on interpreting considerations.

VI. Negotiating with the presenter

When selecting a presenter, the coordinator will need to negotiate with the presenter about fees and expenses. Fees may be determined based on an hourly rate or on a flat rate. Some presenters have pre-determined fees so check with the selected presenter when making initial contact. Sometimes the coordinator of the event will have a pre-determined fee in mind and will offer this to the presenter. Both the presenter and the coordinator have the right to negotiate on the fee. If an agreement can not be reached, the coordinator may decide to select a different presenter. The first presenter should be thanked for his/her time and consideration.

In addition to the presenter's fees, he/she may need to be reimbursed for expenses such as transportation, lodging, meals, and miscellaneous expenses. Transportation expenses may include air transportation, and/or ground transportation, i.e. shuttles, rental cars, taxis, parking at the home airport, etc. Lodging may be provided at a hotel/motel, conference center, or private home. Meals may be provided by the workshop or may need to be obtained on one's own. Miscellaneous expenses include photocopy or transparency costs.

The workshop coordinator should determine if the presenter needs to submit receipts for reimbursement of expenses, or if the sponsoring organization will be billed directly by the hotel, airline, etc.

VII. Arranging transportation and lodging

Sometimes the presenter will make his/her own arrangements and will submit receipts to be reimbursed for these expenses. Other times, a member of the sponsoring organization will facilitate these arrangements. It is often helpful for a local person to make the lodging arrangements since the presenter may not be familiar with the area.

VIII. Estimating the number of participants

The number of participants may be determined by the presenter, the size of the selected space, the audience, or by the topic. For example, a limit on the number of participants may be set for a workshop that is geared toward interpreters working in a highly specialized setting, i.e. legal or medical.

IX. Determining the prerequisites

The coordinator(s), the presenter, or the topic may determine this. Is certification required to attend the workshop? Are the participants required to have a certain number of years of experience? Is the workshop part of a series where attendance at the beginning of the sequence is required for participation at later sessions? Are the prerequisites different for Deaf and hearing interpreters?

X. Finding a location

The following settings can be considered when selecting a site: colleges, schools, retreat centers, community centers, agencies, hotels, hospital community rooms, etc. Find out if a particular location charges a usage fee for the space. If so, the coordinator will need to decide if this cost is within the budget guidelines. (Budget information will be discussed under Financial Considerations.)

Go and see the space before deciding if it will meet your needs. Make sure that lighting is adequate and that there are clear sight lines, especially if the workshop will be conducted in ASL. Make sure the size and shape of the room are adequate. A long, narrow room may not work for some events. Make sure that there is appropriate heating and/or air conditioning for the event. Check to see if there are any visual distractions in the room, such as striped wall paper, patterned carpeting, or windows that produce a lot of glare.

XI. Checking the sound and lighting

If you are using a sound system provided by the location, make sure the equipment is in working order and that someone on-site is available on the day of the event in case of problems. Make sure the lighting is sufficient for the event. Many locations have general room lighting, but not spot lighting. Is the lighting bright enough for a signed event?

XII. Determining audio/visual needs

The presenter usually determines this so ask him/her what is needed. Equipment needs might include a TV/VCR combination, an overhead projector and screen, flip charts or a white board and pens, a microphone or a closed-loop system, and/or a display projector for PowerPoint.

XIII. Arranging for the equipment

Once you've determined what the presenter needs, make sure you can get it and that all the equipment will be in working order for the event. Find out if you will need to provide the equipment, or if equipment is available at the site you selected. If the site provides the equipment, find out if there are any additional costs for using the equipment. If you need to contract with an outside source for the equipment, make sure that a contact person and/or technician will be available on the day of the event.

Make sure that all equipment and parts (i.e. cables, cords) are delivered as ordered.

XIV. Developing a flyer

Make sure the information is easily accessible and understandable. Use plenty of white space on the flyer so it doesn't look cluttered. If the flyer includes a cut-off registration form, make sure there isn't any pertinent information on the other side of the form. If the registration form is separate from the flyer, make sure it includes identifying information in case it gets separated from the flyer, such as the name and dates of the event and the name and phone number for the contact person.

The flyer should include the following information:

Dates

Times

Title of workshop

Description of workshop

Presenter's name and a short biographical sketch

Location, including name of the facility, address and local phone number if appropriate

Information about CEUs

Costs, including pre-registration and/or at-the-door prices

Information about cancellation policy

Contact information if someone has questions, i.e. name, phone number, email address
Registration form and payment information (checks payable to whom?)
Address for sending in the registration form and fees

XV. Publicizing the event

In general, six (6) weeks notice for most workshops or an event is usually adequate. However, for workshops that may have pre-readings or other prerequisites, more advance notice may be necessary. For workshops that are highly specialized or that are geared toward a specific audience, i.e. educators or legal interpreters, it may be helpful to send out “Save the Date” notices three to four months prior to the event so that participants have time to plan their schedules.

There are several venues in which to publicize the event, including mass mailings, email distribution lists or list-serves, and organization newsletters or bulletin boards. The type of advertising will vary depending on the event and the target audience. Even when most of the publicity is handled on-line via email or list-serves, it is helpful to have a paper copy of the flyer for distribution.

XVI. Collecting Registration

One person should be designated to collect registrations that are sent via mail. This person will be responsible for compiling a list of names of registrants and for processing the funds. This person may also be responsible for handling on-site registration. Make sure that the organization or agency has a system for handling all incoming and outgoing funds.

The sponsoring organization will need to determine acceptable forms of payment. Possible forms of payment include cash, checks, credit cards, and money orders. This information should be included on the flyer. Example: “Make check or money order payable to...”, or “Visa and MC payments accepted”. Determine, too, if purchase orders (POs) are acceptable. POs tend to be used by school districts.

XVII. Arranging for refreshments

The committee should determine if refreshments will be served, and if so, what kind and how much. It may be necessary to estimate the number of participants, particularly if people are allowed to register at the door.

Items that require no cooking or other preparation are easier to provide. For example, supplying bottles of water, juice, or soda requires less on-site work than providing coffee or tea. Pre-wrapped food items such as granola bars and candy, or no-preparation foods such as fruit or cookies, are easier to provide than vegetable or cheese trays.

Paper items such as plates, napkins, plastic ware and cups will also need to be provided. The need for these items will be determined by the kind of refreshments served.

One or more committee members will need to be responsible for shopping for the refreshments. The committee will need to allocate funds for these items, and the shoppers will need to know if they will receive a cash advance to cover these items, or if they will be reimbursed after the fact. In either case, it is a good idea to require receipts for all purchases.

A. Logistical Considerations

ON-SITE

I. Setting up the registration area

Tables, chairs and signs will need to be set up so that participants will know where to sign in and/or register upon arrival at the event. For large groups, it is helpful to break down the alphabet into smaller groups to eliminate long lines on-site (for example: A-F, G-L, M-R, S-Z).

II. Setting up the workshop area

Prior to the event, the committee member in contact with the presenter should find out if the presenter has specific requirements for seating. Tables and chairs will need to be arranged on-site prior to the beginning of the workshop, depending on the specifications, such as in a U-shape, in rows, etc.

Audiovisual equipment also needs to be set up according to the presenter's needs. Make sure that participants can see the overhead screen and TV/VCR. If interpreters have been hired to work the event, make sure there is a place for them to sit or stand as needed. It may be necessary to get a platform for the speaker or interpreters. (Information about hiring interpreters is discussed in section C.)

III. Coordinating volunteers

The planning committee should determine if they will need extra assistance on-site, and if so, what kind. Volunteers can be recruited to help with registration and/or with room arrangement. ASL and/or interpreting students are often willing to assist at workshops so check with your local college or university to recruit volunteers if the workshop is appropriate for them to attend. In some situations it may be helpful to waive the registration fee for volunteers, particularly for students.

If you use students to assist with registration, make sure the person handling on-site reservations is trustworthy, as they will be handling funds, both checks and cash.

IV. Handling the registration process

The person who has been collecting the pre-registration materials should compile a list of names of all pre-paid participants and have this list ready on-site. Name tags should be provided; these can either be pre-written by the committee so that participants only need to pick up their tag upon arrival, or they can write their own name tags upon arrival. For some events that require pre-registration so that all participants are known ahead of time, the committee may decide to use name tents, which should be prepared prior to the event.

For on-site registration, one or two people should be designated to collect registration forms and funds. A receipt book, pens, and tape should also be available on-site as needed. One person should be designated to handle problems that may arise, such as comments that “the check is in the mail”, or “my school/employer sent it in already.”

V. Providing refreshments

The committee members in charge of refreshments will need to set up all items in an easy-to-reach, yet unobtrusive location. Trash cans should be located nearby. Tables may need to be relocated for this use.

VI. Making announcements and acknowledgements

One committee member should be designated to make housekeeping announcements (i.e. bathrooms, smoking outside, CEU process, and parking) and to introduce and/or thank the co-sponsors of the event. This person, or another designee, will also be needed to introduce the presenter and the topic, and the working interpreters if any.

A. Logistical Considerations

POST-EVENT

I. Thanking the people involved

One committee member should be designated to thank the following people: the presenter(s), interpreters, co-sponsors, committee members, volunteers, participants.

II. Cleaning up

The committee members should make sure the room looks the same after the event as it did prior to the event. The refreshment area should be cleaned up and all trash put in the garbage can. The tables and chairs will need to be arranged as they were found, or put away in the designated locations. All equipment will need to be turned off and returned to its proper place in working condition.

B. Financial Considerations

PRE-EVENT

I. Developing a budget

It is important to know what expenses and income are associated with the event. If the planning committee is unfamiliar with how to estimate expenses, they can contact an organization or agency that has coordinated past events. Some line items under estimated expenses are set figures, such as the presenter or interpreter fees. Other expenses will require educated guesses, such as photocopying or refreshment costs, or presenter or interpreter expenses. It is always safer to estimate high and to have fewer expenses at the end of the event rather than to estimate low and have outstanding bills.

II. Determining registration fees

The base fee for registration should be based on anticipated expenses minus the anticipated income from other sources divided by the number of participants. The committee will need to determine the 'break even' point so that if registration is lower than expected, or if anticipated income from outside sources is lower than expected, they will know at which point they may need to cancel or postpone the event.

III. Finding co-sponsors and other funding sources

There are several sources of funding available for interpreting workshops. Possible sources include RSA regional grants, the Gallaudet University Regional Centers, Department of Vocational Rehabilitation, school districts, non-profit organizations and agencies, and businesses with deaf employees. For a list of GURC sites, visit Gallaudet University's web site at www.gallaudet.edu.

Some businesses or organizations may be willing to donate services or products rather than funds. These in-kind donations can be used toward refreshments, or as door prizes or raffle prizes. It is also possible for two or more organizations to set up simultaneous events at the same location and to publicize these events together to make them more cost effective.

IV. Raising funds (raffles, silent auctions)

Another way to raise funds for an event is to hold a raffle or silent auction. This will require additional coordination including deciding upon what items to raffle or sell, procuring the items, and setting up the sale area.

If the item(s) selected will be raffled off, the committee will need to purchase raffle tickets, decide upon the cost of the tickets (for example \$1 each or 6 for \$5), organize the selling of tickets and collecting the funds. They will also need to designate when the raffle will be conducted and select someone to draw the winning ticket.

For a silent auction, items will need to be collected either by asking members to donate them, or by asking businesses to donate goods and/or services. The silent auction forms will need to be developed and organized on site at the event. Someone will need to be responsible for overseeing the bidding process and for collecting the money and distributing the items at the end of the auction.

V. Developing a refund policy

The planning committee should develop a refund policy and list this policy on all promotional materials. This will alleviate some problems that may arise when a registrant is unable to attend. There are several ways to provide refunds, including the following. This list is not exhaustive.

EX:

Cancellation received in writing by September 27, 2002	Amt. less \$50 fee
Cancellations received in writing after September 28, 2002	0% refund

EX:

Cancellation received in writing by 9/27/02	50% refund
Cancellations received in writing between 9/28–10/31/02	25% refund
Cancellations received in writing after 11/1/02	0% refund

EX:

No cancellations after 9/27/02 unless a replacement participant is found.

EX:

Refunds will not be given but payment can be applied toward a future workshop with this organization.

B. Financial Considerations

ON-SITE

I. Determining expenses

The planning committee will need to determine if there will be any on-site expenses such as lunch or photocopy costs. Providing lunch will allow people to relax during the break without having to worry about going out to eat, particularly for the presenter and the working interpreters. A member of the committee will need to get their lunch orders and go out to purchase the meals. If the committee decides to provide lunch for all the participants, this expense will increase but the fees can be calculated into the registration costs.

A need for additional photocopies may cause the committee to incur extra costs.

II. Having funds available

If the committee members anticipate needing cash at the event, they will need to determine where the funds will come from, and who will be responsible for keeping them. Will they need to pay for items out-of-pocket and then get reimbursed? Will petty cash be available, possibly from on-site registration income?

B. Financial Considerations

POST-EVENT

I. Paying the bills

The planning committee members need to determine who will handle paying all expenses after the event. This is often handled by the organization's treasurer, but not always. The committee members will also need to determine if an invoice or receipt is needed prior to payment. Payments should be made in a timely manner, usually within 30 days of completion of the event.

II. Depositing Funds

One person will need to be responsible for depositing all income generated by the event, whether from registration, raffles or silent auctions, or other revenue sources. All deposits, particularly of checks, should be made in a timely manner, preferably within a week of the event.

C. Interpreting Considerations

PRE-EVENT

I. Determining the need for interpreters

The planning committee members need to determine if interpreters will be hired for the event. This decision is often based on the language of the workshop, the presenter's preference, the target audience, and the purpose of the event. For example, if the workshop with a Deaf presenter is informational in nature and the goal is for people to understand the information rather than to work on their language skills, then the committee may want to hire sign-to-voice interpreters. If the workshop with a Deaf presenter is on language skills development, the committee may decide not to hire interpreters. This information should be made clear on the flyer.

If interpreters are needed for an event, the committee will need to know if sign-to-voice or voice-to-sign interpreting is required, or both. This will have an impact on who gets hired for the job. Additional considerations include whether or not to hire a Deaf interpreter, or whether or not to hire interpreters for Deaf-Blind participants.

Once the committee has decided to hire interpreters, they will need to decide the following issues: How many interpreters are needed? What special skills are required, if any? Is certification required to work this event and what kind? Which interpreters work well together as a team? Which interpreters will work well with this presenter and/or topic?

II. Determining interpreters' fees

Once the committee has decided to hire interpreters, they will need to decide how much they will pay them, using either an hourly rate or a flat rate. The amount will be influenced by the event and the requirements on the interpreters, as well as by the market rates for that geographic area.

III. Determining interpreters' expenses

Additional expenses that may be incurred by the interpreters include transportation (i.e. air fair or mileage), meals, lodging, or parking. For some events, the interpreters may also be paid for preparation time.

IV. Negotiating and hiring the interpreters

One person on the committee should be responsible for hiring the interpreters, and for negotiating with them for fees and/or expenses.

V. Processing contracts

This person who negotiates with the interpreters should also be responsible for providing contracts if required by the organization, or for obtaining invoices from the interpreters after the event.

C. Interpreting Considerations

ON-SITE

I. Preparing with the interpreters

The committee will need to check with the presenter to see how much time he/she wants to meet with the interpreters prior to the event. If possible, get a copy of all handouts and/or overhead materials (i.e. PowerPoint slides) and send these to the interpreters prior to the meeting. This will give them a chance to become familiar with the materials and write down any questions they may have.

II. Placing the interpreters

The placement of the interpreters will be determined using several factors including, but not limited to, the type of interpreting, the type of presentation, the presenter's style, the placement of the consumers, the needs of the audience, and/or the configuration of the room.

C. Interpreting Considerations

POST-EVENT

I. Paying the interpreters

The committee should pay the interpreters in a timely manner, preferably on-site, but no later than 30 days after the event or after receiving an invoice.

If the interpreter incurred any expenses, these should also be paid in a timely manner after receipt of any required receipts.

The committee should determine if the interpreter's fees and expenses will be paid together with one check, or separately with two checks.

II. Debriefing with the interpreters

Check with the presenter to see if he/she wants to debrief with the interpreters after the event. The coordinator should also debrief with the interpreters to make sure everything went smoothly and to clarify any issues such as payment.

D. Miscellaneous Considerations

PRE-EVENT

I. Processing Continuing Education Units (CEUs)

Contact an approved RID CMP and ACET sponsor to obtain the necessary paper work to process your event for RID CEUs. NOTE: The approved sponsor must submit Activity Forms to the RID National Office 30 days PRIOR to the event, which means the Sponsor will need the forms 35-40 days prior to the event to ensure enough time for processing.

Other organizations will have different timelines so check with the appropriate person to make sure you understand the deadlines for submitting paperwork.

II. Developing an evaluation form

Check with the presenter to see if he/she has a specific evaluation form that he/she likes to use. If not, the planning committee should provide a form at the workshop.

III. Recruiting volunteers

The committee members need to determine how many volunteers are needed for the event and for what jobs. For example, volunteers may be recruited to help with one or more of the following jobs: bulk mailing of flyers, on-site registration, refreshment set up and clean up, chairs and/or tables set up and clean up.

Consider recruiting ASL or interpreting students when appropriate in exchange for a fee waiver to the event. If students aren't available, offer a couple of the workshop participants a fee waiver in exchange for helping on-site.

D. Miscellaneous Considerations

ON-SITE

I. Providing CEU sign-up sheets

Make sure the appropriate forms are available at the workshop. The RID CEU sign-up scantron form should be provided by the RID approved sponsor who processed the CEU paper work. If this form isn't received a week prior to the event, check with the sponsor.

II. Distributing and collecting evaluation forms

One or two volunteers should be designated to distribute the evaluation forms at the end of the event and to collect them after they've been filled out. Make sure there are enough copies for all participants.

If several events are occurring simultaneously, consider using a different color for each event or session.

D. Miscellaneous Considerations

POST-EVENT

I. Compiling the evaluation forms

One or two committee members should be designated to tally the information on the evaluation forms. A copy of the results should be sent to the presenter, preferably within 30 days of the event.

When typing participants' comments, copy them "as written." Do not edit them for spelling, grammar, punctuation, etc.

II. Providing verification of attendance

Some form of verification of attendance should be provided at the end of the event. This can take the form of a letter on the organization's letterhead or a certificate of completion.

III. Sending thank you letters or notes

The committee should formally thank in writing the people who worked on the event including, but not limited to, the following people: the presenter, the interpreters, and the

location liaison if any. Volunteers should also be thanked, either en masse (for example if a group of students helped as part of their class), or individually if there are only a few.

References:

Simon, J. (2003). *Manual: How to coordinate and host a successful workshop*. Retrieved April 13, 2003 from Western Oregon University, Region X Interpreter Education Center Web site: <http://www.wou.edu/education/sped/iec/host.pdf>