

INTRODUCTION

A primary activity of the Maryland Library Association is the presentation of programs, workshops, and conferences. To help those members responsible for program planning, the Professional Development Panel (PDP) has developed this manual of planning guidelines.

A quick review of the entire manual provides an overview of basic procedures. If you have any questions about program planning, please contact your liaison on the Professional Development Panel. He or she is there to help the divisions plan the best possible programs for MLA members.

Presentations, programs and discussion groups, must be approved by the PDP. The forms with which to do this are included here. The PDP is committed to facilitating excellent MLA programs of all types. The approval process is how the PDP provides all the assistance it can to ensure the success of MLA programs.

The MLA office (410-947-5090) maintains a calendar of scheduled MLA events. Information about the scheduled programs and programs still in the planning stages may be obtained from the PDP officer. A master calendar of library events is maintained at www.mdlib.org. This calendar includes, not only MLA events, but also those of other organizations.

This manual deals with planning fundamentals. These are the steps which must be taken to assure that your program is both effective and on target. To get you started, a Program Planning Timetable is on page 3.

The sections of the manual are arranged chronologically to help you as you work through the timetable.

THE MLA PROFESSIONAL DEVELOPMENT PANEL YOUR TRAINING CONSULTANT

Each MLA division is responsible for at least two programs during the year – one at the annual conference, plus one more. Many divisions put on programs in addition to this.

In all aspects of program planning, your liaison can help. Each division has a PDP liaison. Think of him or her as your training consultant. He or she can:

Attend planning meetings with your members as you decide on your upcoming programs.

Identify speakers, topics, formats, and anything else your division needs to provide great training.

Answer questions about training in general, and MLA procedures in particular.

Assist with follow up and evaluation.

Your liaison will contact your division and offer you assistance.

PROGRAM PLANNING TIMETABLE WORKSHEET

Program name: _____ Date: _____

Planning a program should begin at least 5 months ahead of the proposed date. This allows time for approval to be given, speakers to be contacted, a site to be secured, as well as adequate time for publicity to be mailed. For your planning convenience, the necessary steps for a successful program are outlined below.

ACTIVITY	TO BE COMPLETED	COMPLETION DATE
Date selection	5 months prior	_____
Topic selection	5 months prior	_____
Develop learning Objectives and format	4-5 months prior	_____
Location selection	5 months prior	_____
Program approval form To PDP (c/o MLA Office)	3 months prior	_____
Publicity info submitted To Happenings	2 months prior	_____
Press release submitted To Crab	use Crab deadlines	_____
Registration deadline	1-3 weeks prior	_____
Program checklist Complete	1 week prior	_____
Program evaluation	Day of program	_____
Program Evaluation, Coordinator Feedback And Final Financial Reports, and summary of evaluations submitted (MLA office)	4 weeks after program	_____

DATE SELECTION

The selection of an appropriate date is crucial to the success of your program. Clear proposed dates with the MLA office (410-947-5090) before you continue with your planning. (Also check the master calendar at www.mdlib.org.)

Avoid dates close to (in the same week as):

- MLA Annual Conference
- Other division or interest group programs
- ALA Annual Conference and Mid-Winter Meeting
- PLA Conferences
- Religious holidays
- Holidays
- Library system staff days
- MEMO/CSD Fall Conferences

Also consider:

- Time of Year
- Weather conditions
- Recurring events affecting the target audience.

TOPIC SELECTION

NEEDS ASSESSMENT

Before a topic is selected, the planners should determine the precise needs and interests of the target audience. At some point every year or two, divisions and interest groups should conduct a needs assessment of their members in order to determine appropriate topics for programs.

Some suggestions for needs assessments:

- Send out a questionnaire
- Have a brainstorming session at a meeting
- Talk informally with staff members
- Look around your own library setting for ideas
- Survey professional literature
- Look at programs from national or other state conferences.

Ruth Warnecke suggests in *Planning Library Workshops and Institutes* (ALA 1986) that there are a few basic questions for planners to ask themselves before beginning the planning phase of a specific workshop:

- Is the topic or problem so new that potential participants will have no other opportunity to learn about it?
- Is the topic or problem a continuing one, requiring activities to update knowledge or to seek new solutions?
- Is the topic or problem the most important one to be considered at this time?
- Is the topic or problem appropriate for sponsorship by the group?

Once the planners have discussed these questions, they may broaden or limit the scope of the program topic.

At this point, you may also consider co-sponsorship of a program. Many program ideas appeal to more than one division of MLA. MLA divisions are encouraged to co-sponsor programs in order to broaden the audience. See the appendix for the MLA Definitions of Sponsorship and Co-Sponsorship.

LEARNING OBJECTIVES

Once a need for the program has been determined, the planners must write clear learning objectives for the target audience.

Learning objectives are concise statements of what the participants are expected to achieve as a result of the program. Objectives also direct the program planners toward developing and conducting the kind of program that meets the target groups' needs. Several objectives may be chosen for one program.

Effective objectives:

- Use active verbs
- Describe observable behavior
- Are written from the participants point of view

Examples of learning objectives:

- “At the end of the program, participants will be able to explain the two main differences between the Dewey Decimal and the Library of Congress Classification systems.”
- “At the conclusion of the program, participants will be able to demonstrate three appropriate behaviors for dealing with angry patrons on the telephone.”
- “At the end of the workshop, participants will be able to demonstrate five book repair techniques.”

List of active phrases to use in learning objectives:

write	explain
classify	list
prepare	apply
define	describe
demonstrate	

Words to avoid in learning objectives, because they do not describe observable behavior:

be aware of	know	feel
remember	appreciate	enjoy
be familiar with	comprehend	understand

PROGRAM FORMATS

Once you have chosen your date, decided on a topic, and developed good learning objectives, you are now ready to prepare a program format that best carries out those objectives. Remember to center the program planning on your audience and their needs, not on the program planners' needs.

There are several options for providing continuing education opportunities to MLA members. Each MLA division is required to hold one program at the annual conference, and one additional program, per year. Below are the different ways to provide these opportunities:

PROGRAMS

Definition: Half day, full day, or longer. Minimum registration fee is \$10.00 for MLA members. Charge 50% more for non-members. Participants register through the MLA office.

Publicity: Through Happenings, Crab, Marylib, MLA Website, other MLA publication, and networking through members. Remember that each division is entitled to one free mailing per year to its members through the MLA office. You might want to use this to publicize your program.

DISCUSSION GROUPS

Length = 2 hours or less. As part of a regular division business meeting. No registration fee charged to MLA members. A program approval form is required – to help ensure quality planning. Remember to send publicity to the MLA office for Happenings. You may use the free division mailing to publicize your discussion group.

For all these formats, it is necessary to follow the procedures outlined in this manual – completing the Program Approval Form, monitoring the program budget, and evaluating and following up the program (with annual conference programs, much of this is done through the Conference Committee, to which your division has a representative). The objective of MLA is to provide quality continuing education opportunities for its members, and these guidelines are tools to help your division do that. Even a short discussion group after a meeting needs the same careful planning and attention to detail as does an all-day pre-conference.

CONFERENCE COMMITTEE CALENDAR

The Conference Committee of the Maryland Library Association will meet monthly. The location and meeting date will be set each year by the Conference Chair.

ANNUAL CONFERENCE PROGRAMS

Four types:

- PROGRAMS – Speaker or workshop format, at least 90 minutes long (may be longer).
- PRE-CONFERENCES – All day program, workshop format. Separate registration fee charged.
- POSTER SESSION – Visual displays with handouts. Division members staff displays to answer questions.
- TABLE TALKS – Small group discussion led by a facilitator. Divisions can sponsor a table and provide a facilitator. Several discussion tables go on at once, then participants switch tables and topics.

PROGRAM LAYOUT AND ACTIVITIES

Now it's time to get down to the nitty-gritty; deciding exactly what your participants will DO at your program!

The layout of the program should be chosen to best carry out the learning objectives of the day. For example, if your objective is that the participants demonstrate two methods of dealing with angry patrons, a lecture format won't be the best answer. A format that combines demonstration and practice will produce the best results.

Also, variety adds interest to the day's schedule. If you have a guest speaker giving a lecture, following the talk with a video or small group discussions will keep the day from becoming too stale.

Consider some of the following options when developing the program schedule:

LARGE GROUP DISCUSSION – This means involving the entire audience in an interactive discussion. The discussion facilitator should be well informed about the program's objectives, experienced in leading group discussions, and aware of the techniques which encourage participation by all (e.g. open-ended questions, summarizing, paraphrasing, etc.). Discussion involving a large group works best with 30 people or less.

SMALL GROUP DISCUSSION – The same principles apply as for large groups, but break a large audience down into several smaller groups. If you can appoint a facilitator for each group to move things along, so much the better. However, if small groups are given a clear task, they can usually accomplish it without a trained facilitator. Be sure to allow enough time for each group to "report out" to the entire group. Appointing recorders who take notes and present to the large group can speed this up.

BRAINSTORMING – This can be used in both small and large groups. The rules of brainstorming are: everybody contributes ideas, no ideas are judged or commented on, keep the ideas coming as long as possible, no idea is too crazy, and try to piggyback on other ideas. Brainstorming is good for problem solving and for planning.

CASE STUDIES – Can also be used in both small and large groups. Small groups or individuals are given case studies to read, take action on, and report. Case studies are difficult to write so that they are both believable and also open to many interpretations. Some tips for successful case studies are: write them in the form of stories, name the characters, use realistic details, be descriptive, and use humor.

ROLE PLAYING – Acting out a hypothetical situation can be very useful in small groups, especially in portraying interpersonal situations. As in case studies, the situations need to be carefully scripted so that the roles are fleshed out, yet the solutions are not obvious. Many people think of role playing as simply putting on a skit of “before” and “after” behaviors. However, good role-plays involve both the “actors” and the audience in the discussion that follows; and good role plays can generate a lot of discussion.

PANEL DISCUSSION – Panels can be very effective with dynamic panelists and a skilled moderator. Be sure the panelists represent different points of view and are accustomed to public speaking. The key to a good panel is to have plenty of time for questions from the audience.

LECTURE – If you have a very dynamic speaker, lecture may be an appropriate format for some topics. As with a panel, it is essential to provide for lots of question time. You may also follow a lecture with group discussions. If you have never heard a particular speaker before, try to see him or her in action before deciding on them for your program.

Once you have determined which format will best accomplish your objectives, also consider the following when laying out your program and deciding on the agenda:

REGISTRATION – Provide at least a half hour, even if registering only involves picking up a nametag and handouts. The MLA office will provide personalized badges, holders and an up to date registration roster.

COFFEE AND FOOD – May be provided during registration, or only at the breaks. Be sure to provide a de-caffinated alternative (de-caf coffee, and tea, herbal tea).

BREAKS – Should be about fifteen minutes long. The first break should come early in the program – participants should not sit for more than 60 to 90 minutes without a break. Consider the option of two 10 minute breaks for an intense program. Tell the participants when the breaks will be before the program starts.

MEALS – Allow an hour for meals served on site, and 90 minutes for going out for a meal.

ICEBREAKERS AND ENERGIZERS – Use these fun activities to get people talking and moving. Use an icebreaker to start your day, and energizers after lunch and breaks.

SPEAKERS’ INTRODUCTIONS – Always have someone prepared to introduce the speaker and facilitator.

WRAP UP AND EVALUATION – Do not pass out evaluation forms two minutes before the scheduled ending time and expect any valuable feedback. Give the participants plenty of time, and tell them how you value their comments and how you will use their input. Ask the participants to put the completed evaluations in a box or on a table, rather than collecting them in person, to assure anonymity.

START AND END ON TIME – Be doubly sure that your speakers are aware of how much time has been allotted to them. Tell them what is coming after their presentation, so they know how “running over” will affect the whole day. Establish “time” signals with the speaker, so you can subtly let them know they have five minutes left or that their time is up. If you are working with a speaker known for taking a long time, these points are especially important.

Below are some sample program agendas:

FULL DAY

9:00 AM	Registration and coffee
9:30	Introduction and icebreaker
9:45	Videotape showing and discussion
11:00	BREAK
11:15	Guest speaker
12:00	LUNCH
1:00	Energizer to wake up the group
1:15	Exercise – case studies
2:30	BREAK
2:45	Exercise – small group discussion
3:45	Reports from small groups
4:00	Wrap up and evaluation
4:15	Adjourn

HALF DAY

9:00 AM	Registration and coffee
9:30	Introduction and icebreaker
9:45	Exercise – Role play in small groups
10:45	BREAK
10:55	Videotape showing and discussion
11:45	BREAK
11:55	Small group discussion, leaders report back
12:20	Wrap up and evaluation
12:30	Adjourn

LOCATION SELECTION

There are many things to consider when choosing a location:

- Ease of access from major highways
- Parking
- Access by persons with disabilities
- Overnight accommodations, if necessary
- Food service or nearby restaurants
- Rental fees (room, utilities, AV equipment, union labor)
- Security

Programs can be held in a variety of facilities. Most often, MLA programs are held in library meeting rooms, which usually do not charge rental fees. In addition to low cost, library meeting rooms offer the participants a chance to tour a library other than their own, and staff of the library can act as facilitator of local arrangements (they know where the restaurants are!).

Hotels and convention centers are suitable for large conferences and meetings, and are staffed with coordinators to help you plan your event. The charges for this are often quite high – you have to determine if the nature of your program makes this type of facility a viable option. College campuses are often good options – accommodations can be very reasonable.

The site you choose depends a lot on the type of program you will be having, which is why we include it as this step in the process. Questions to ask about a site include:

- Will there be several group discussions simultaneously so that “breakout” rooms (additional rooms) are needed?
- Are meals to be catered, or is site close to restaurants?
- Will the program be longer than a day? Do you need overnight lodging?

When looking at the room(s) itself, here is a list of considerations:

- Can the room temperature be controlled? How?
- Is the lighting adequate? Can you control it?
- How are the acoustics? Soundproofing? Is there sound “bleed” from other rooms?
- Is the room flexible – can you move the chairs and tables around if you want to?
- Does the room match the size of your audience?
- Is there adequate space for registration?
- Where are the restrooms and are there enough of them?
- What about smoking?

- Is there room for exhibits, if needed?
- Can you tape flip charts to the walls?
- Is there a secure area for coats, and/or for keeping things overnight during a multi-day workshop?
- Can directional signs be posted if needed?

Room arrangement depends, again, on what you plan to do during your program. Be sure you consult your speaker(s) and facilitator(s) about what room arrangements they are expecting.

AUDIO-VISUAL EQUIPMENT

The use of audio-visual and other training aids can enhance any type of program. Films or videos can stand alone, or be used to illustrate a point or to start a discussion. Slides, overhead transparencies, and flip charts can all contribute to a lively program that is more than just “talking heads”.

When using film or video, treat the presentation like a speaker – introduce it, give some background, and tell the audience what it is about and what points to watch for. After the presentation, give the audience a chance to process the experience by discussing and summarizing the film.

Equipment can be borrowed from your own or other libraries, often at no charge. For large conventions and meetings, it must sometimes be rented from the hotel or convention center.

Always check and recheck AV equipment before the program – LONG before, so you have enough time to correct any problems.

Below is another checklist – this one of things to consider when using AV equipment:

- Electrical outlets – where are they?
- Three prong adapter plugs – do you need them?
- Extension cords – do you need? How many? Do you need to tape them down to keep people from tripping over them?
- Screens – does room have one built in, or do you need to bring one?
- Can the room be made dark enough for video or slide presentations?
- How are the acoustics? Can everyone hear? Does sound “bleed” from room to room?
- Can everyone see? Do you need to adjust your seating arrangements?
- Do you need a projection cart or other piece of furniture to put the equipment on?
- EXTRA BULBS! Don’t leave home without them!

PROGRAM APPROVAL FORM

The Program Approval Form (PAF) is due to the Professional Development Panel about 3 months before your planned program date. You can send it in earlier than that. You may find the form useful as a planning document – filling out the correct sections as you are working on that part of the program. The PAF is meant to help you plan your program in a logical way while ensuring you meet all the requirements of MLA program planning.

When the PDP members review this form, they are looking for good content, strong learning objectives, and relevance to the members' needs. The panel carefully reviews the PAF and offers any suggestions to the division/interest group for developing the best programs possible for MLA members.

Your PDP Liaison is the best person to help you fill out the PAF, and to assist you in all phases of program planning. Call on them for help whenever you need it. The Liaison will also be able to answer questions from other panel members when the proposal is discussed.

The PAF includes a section on finances. Program finances are an important part of the planning process. After you have decided on the “meat” of your program, the learning objectives, relevance, format, and speakers, then work on the financial aspects. MLA programs are expected to make money. Programs that lose money or only break even are actively discouraged. (The exception to this is discussion groups, which do not have any costs involved.) Be aware when planning programs of the financial goals set by the Executive Board for your division. If you can make more profit MLA will benefit. When pricing your program, take into account not only the expenses but also the value of the program. You are offering a solid learning experience with relevant objectives and applications to the everyday work of our members. This is worth much more than the \$5.00 per person it may cost to provide refreshments.

A sample of the PAF is in the appendix. When the form is complete, send it to the PDP chair at the MLA office.

PUBLICIZING YOUR PROGRAM

HAPPENINGS

Using the monthly *Happenings* is the best way to publicize your program. It is mailed to all members of MLA each month, and lists all the upcoming programs and events.

Happenings is also used as a universal registration form for all MLA programs in the upcoming months. Members use one form to register for whatever programs they plan to attend, and send the forms and their checks directly to the MLA office. Take full advantage of this registration format by getting your information in as soon as possible.

The essential information needed for *Happenings* is included on the PAF. You may also want to include some additional information, such as a fuller program description, information about meals, assignments, etc. If you include this information on the original form that you submit to PDP your job is finished. If you want to add the information later, keep a copy of the form you submitted to PDP. Then you can send that copy, with the added information, to the MLA office later. If you do this, please check the box stating that the form is a re-submission of *Happenings* and include the new date. Be sure that you get it in by the *Happenings* deadline.

The deadline is the 1st of the month before the mailing is sent. For example, October 1 is the deadline for the November issue. This is a firm deadline, so make sure your copy is sent to the MLA office in plenty of time. It's a good idea to get your information in as soon as you have all the details – about 3-4 months prior to your program.

The Conference Committee coordinates publicity for the annual conference program. It is usually not necessary to publicize conference programs individually in *Happenings*.

When you are planning your program finances, budget \$25.00 for the *Happenings* mailing. It will be charged to your division/interest group program budget.

THE *CRAB*

The *Crab* is the quarterly newsletter of the Maryland Library Association. It is mailed to all members. An article or press release in the *Crab* is an excellent way to publicize your programs.

Crab deadlines for the fiscal year will be distributed by the *Crab* Co-Editors.

The long lead time required for the *Crab* means that you may not be able to use it to publicize your program if you don't have all the planning elements in place by the deadline. Yet another reason to plan as far ahead as possible.

MLA WEBSITE (www.mdlib.org)

The *Happenings* online is updated monthly and includes information on programs. There are links to the division/interest group pages and registration is available online.

All MLA programs and events are listed in the Maryland Library Events Calendar found on the MLA Website. The calendar is a multi organizational listing of events and is accessed by the library community statewide. Your programs are listed here as well as in the *Happenings* calendar on the Web upon receipt of the PAF with complete information for the *Happenings*.

MARYLIB

Maryl原因ib is a great way to inform those who subscribe about upcoming programs. Just be sure to wait until you receive approval from the Professional Development Officer before you send anything out about your program.

OTHER PUBLICITY

Advertise your program in as many sources as you can think of. Consider notifying library systems for their in-house newsletters. "Talk it up" with your own co-workers. If you are co-sponsoring your program, both groups should brainstorm ways to make the program known to the most people.

Each division/interest group can, once a year, send a mailing through the MLA office to their division/interest group members. This is an excellent way to publicize your program, but it should not be the only way. Most division/interest group programs have appeal to MLA members in all divisions/interest groups. Don't limit the scope of potential attendees.

PROGRAM FINANCES

Program Finances have already been discussed. In the appendix are other forms you will need to conduct the financial business of your program:

1. **MLA DEPOSIT FORM** – Use for any registration money or other income that your division receives. Since registration is handled by the MLA office, you should only get money for “at the door” registrations. Return this form with the money to the MLA office.
2. **MLA REQUEST FOR PAYMENT FORM** – For advances and/or reimbursements. This is submitted to the Treasurer at the MLA office. In the case of reimbursements, receipts should be attached to the form and should total the requested amount. All invoices from vendors, service agencies, or speakers should go to the person in charge of the program, who should check them for accuracy before attaching them to this form.
3. **MLA POLICY ON REFUNDS** – Important policy to know when potential registrants have questions. Not a form, but for your information.

A final note on the financial side – NO sales taxes will be reimbursed. Use the **MLA Tax Exempt Number – 31062509**.

PROGRAM CHECKLIST

_____ Speaker(s) arrangements complete (invitation letter, map/directions, AV needs, handouts, etc.)

_____ AV Equipment

- _____ Microphone
- _____ Screen
- _____ Projector (overhead, slide, movie, video)
- _____ VCR and monitor
- _____ Extension cords
- _____ Plug Adapters
- _____ Computer equipment
- _____ Other AV

_____ Room Arrangements

- _____ Seating
- _____ Podium
- _____ Flipchart, paper, markers
- _____ Nametags
- _____ Handouts
- _____ Directional Signs
- _____ Other room details

_____ Refreshments

- _____ Coffee maker and coffee (decaf, regular)
- _____ Hot water and tea (regular, decaf, herbal)
- _____ Juice
- _____ Sweetener
- _____ Cream (real or non-dairy)
- _____ Lemon
- _____ Spoons/stirrers
- _____ Cups (hot and cold)
- _____ Napkins
- _____ Plates
- _____ Forks
- _____ Tablecloths
- _____ Serving trays/cutting and serving utensils

PROGRAM PACKS

A few days prior to the program, the MLA office will send the contact person/program planner a “Program Pack” which will contain:

- A Program Packet Checkoff List
- Roster
- Financial Report
- Sign-in Sheet (Must be signed to receive continuing education contact hour credit)
- Receipts (To be distributed to attendees)
- Evaluation Sheets (Evaluation Summary Sheet and Final Financial Form)
- Certificates for the Speaker(s)
- Invitations to Membership (For MLA non-members)
- Name Tags and Badge Holders

Name tags and badge holders will NOT be assembled by the office. Be sure to allow enough time to burst and/or assemble prior to your program.

Depending on the size of the program and interest from the program planner, a small quantity of fundraising items may be made available to program attendees. If interested, contact the MLA office.

CERTIFICATION RENEWAL CREDITS

Your program may qualify for certification renewal credits. The Professional Development Panel will assign eligible contact hours at the time the program is reviewed. You will receive a sign-in sheet with your Program Packet. Attendees must sign the sheet and the program planner must return it to the MLA office for attendees to receive the credit. The program planner must sign the sign-in sheet to verify that attendees were present for the entire program. If an attendee finds it necessary to leave early, note the time of departure and the contact hours assigned to that person will be revised.

A history of the contact hours earned is kept on file in the association database.

EVALUATION AND FOLLOW UP

Evaluation and follow up are vital parts of any program that are often overlooked. While it is a relief to have the long effort of planning over with, you still aren't finished until the evaluations have been collected and examined.

Following is the standard MLA evaluation form. You can use this form for all programs, including annual conference programs. However, you are always able to develop your own evaluation if you wish. If the standard form does not carry the information that you need to know, develop your own form and make copies for your participants. You can devise a different form for every program you present, if you'd like.

Summarizing the completed evaluations can be a bit tedious, but it is worth it. Once you have summarized the results, you have all the information about the evaluations at your fingertips. There is no standard form for summarizing the evaluations. Use whatever format suits you and provides a good overall picture of the program results. If you need help summarizing your evaluations – contact your PDP liaison.

Once you have summarized the evaluations, complete the Program Evaluation Coordinator Feedback Form. This form is for you, the program planner, to submit your own feedback about how the program went. It also gives MLA and future program planners valuable information about what works and what doesn't, for future programs.

Submit your Coordinator Feedback Form and an evaluation summary to the MLA office as soon as possible after the program. The longer you wait, the harder it is to reconstruct what happened at the program.

When a program's final reports have been received by the MLA office, the program is closed out. A Program Summary Form is generated and retained on a Division/Interest Group disk and in a hard file.

