

Chapter 14

Details, Details, Details

PAYING ATTENTION TO the many logistical details that program planners must address, whether the programs are face-to-face, in cyberspace, or a combination, is an essential component of planning programs. There is nothing more frustrating to participants and presenters than discovering that some of the program logistics have been overlooked and the program isn't running smoothly. Being detail-oriented is what separates good planners from those who should find another vocation—the good planners focus on the “details, details, and more details!” Unfortunately, there is no end to stories where planning has gone terribly wrong because of planners' failure to take care of details, as illustrated by Scenarios 14.1 and 14.2.¹



SCENARIO 14.1: IGNORING THE SCHEDULE OF EVENTS

The program participants are beginning to get restless. According to the schedule, this session should have finished over fifteen minutes ago. A number of people have already walked out of the session, while new arrivals looking for their next session keep opening and closing the door. Still, Julie, who is the presenter, goes on and on, seemingly oblivious to the time. Finally someone who has just entered the room—Jim, who is the next presenter—tries in a very diplomatic way to let Julie know that his session is scheduled in this room next. Julie's response to this interruption is to tell him to wait his turn because she still has some important material to cover.



SCENARIO 14.2: THE SOGGY POTATO CHIP THEORY

Iris is new to conference planning and wants to learn as much as she can about the previous conference, conducted a year ago for the same eight hundred people she serves, Adult Basic Education (ABE), General Education Diploma (GED), and Teachers of English as a Second Language (TESOL) directors and teachers. She visits

programs across her territory to ask some of these people about the previous conference. She hears time after time that the conference was “terrible” and they hope she does a better planning job. When asked for details, people say the speakers were good, the hotel was great, and other elements of the conference were given good ratings. Why then did so many complain about the conference? “Soggy potato chips!” She finally gets the answer! The Saturday luncheon speaker went overtime by thirty minutes and the staff put the tuna salad into the refrigerator, with the potato chips on the same plate! “Soggy potato chips!” Iris decides right then and there to never serve potato chips at conferences she plans.

How could such things as long-winded speakers and soggy potato chips ruin a program? Very easily! These are a few of the many logistical details of education and training programs that program planners must tackle and handle before they become problems. These types of logistical problems arise whether the program is a single event of a half day or less (e.g., a workshop), one with multiple sessions for a number of days (e.g., a conference), or a program that is conducted over a longer period time (e.g., a continuing education course offered by a university or literacy classes for adults). No matter the kind of program, one of the hallmarks of top-notch planners who have the responsibility for logistics is a detail-oriented disposition and the ability to keep track of numerous tasks in a timely manner. The larger the program, the more important it is to spend the time and effort before, during, and after the program to make sure it runs as smoothly as possible.

In this chapter we first address choosing dates and sites that work for education and training programs for both the participants and the sponsors of these programs. Next we look at the importance of obtaining suitable program facilities, and explore negotiating contracts for locations that charge for the use of space. The chapter concludes with a discussion of special issues that relate specifically to one type of program, that of managing conferences.

Choosing Dates and Locations

All educational and training event planning starts in the same way, with three tasks to complete: choosing the date, the location, and planning the budget for the program (see Chapter Twelve for details on budgeting). There are no shortcuts in making decisions about these tasks and until they are set, the program does not move forward.

Program history and organizational history can provide invaluable information to assist in setting a date for an educational event. Previous program planners, advisory committees, or other individuals working with the organization may be consulted as a resource for this information. Data to collect that help in selecting the date are:

- Prior choices of dates (e.g., particular months, days of the week, day-time or evening)
- Reasons why these dates have been chosen before
- Participants' expectations about spending a smaller amount of time on their learning or spending a weekend at the site to attend meetings
- The educational program's traditional ties to family or personal vacation times
- Traditional connection with holidays
- Dates to avoid due to religious holidays, local, or countrywide holidays

It is never a good idea to start off a new program with a bold departure from tradition; thus, the dates and location selected should follow previous customs and expectations. If the program being planned is a new program or the group planning the program is new, the planner can gain information about participant expectations and customs from similar groups or groups in the same location and same profession. The dates for the program or event should be nearly set before program planners look for a site to present the program.

In choosing the venue for an event, as with selecting the dates, program planners consult past traditions of the group. Where have they previously met for educational programs? Again, data can be gathered from previous program planners, advisory committees, or other individuals working with the organization to help the planner reach a decision agreeable to all.²

Though there can be some flexibility, novice program planners ought to be wary of securing a space during a time no one else wants it or when the space is offered at a significantly reduced price, a discount likely driven by lack of other bids (e.g., Labor Day weekend in the United States, Hanukkah, Boxing Day in Canada, Christmas, or Eid holiday in a Muslim country).

Investigating and Obtaining Suitable Facilities

Program planners must also face a series of choices when determining the actual facilities to use for a program. The only way planners may avoid this task is when they hold their programs primarily within their own

facilities (e.g., programs for adults sponsored by colleges and universities, professional organizations, and training centers). However, the majority of planners will still have to make decisions at some point in their career about where programs may be held off site. Even those who plan distance-learning programs may need to reserve physical facilities to offer speakers or participants a place to use equipment. Whether programs are delivered face-to-face or via distance learning, learners need to feel comfortable in the chosen facilities, which should also allow for the different formats, equipment, and techniques that program planners intend to use (see Chapters Eight and Eleven).

Investigating Facilities

There are five types of facilities commonly used for face-to-face or online education and training activities for groups of people: in-house organizational facilities, hotel facilities, conference and retreat centers, college and university facilities, and public buildings (e.g., community centers and libraries). Each type has advantages and disadvantages, depending on the goals and objectives of the educational event, the instructional techniques to be used, the participants, the program presenters and facilitators, the cost, the accessibility, and the type of services the facility provides (Allen, 2009; Munson, 1992). For example, for an organization's three-hour workshop for in-house personnel, the organization's seminar room is probably the best choice. If that same workshop is offered to people from a wide geographic area, however, a central meeting place in a local hotel or community college may work better.

If outside facilities are used, such as conference centers and hotels, program planners must check them out thoroughly. A checklist for selecting facilities can help program planners with this task (see Exercise 14.1) (Allen, 2009; Hartwig, 2000).³ Depending on the kind of program that is being held, planners may use all or only parts of this checklist to ensure all is in order.

In investigating facilities, three other areas are important: choosing meeting rooms, estimating costs, and negotiating contracts. Chapter Twelve contains a sample worksheet for budgeting expenses for facilities as well as other items. This cost estimation is completed prior to negotiating any contract with the rental facilities. Negotiating contracts is discussed in a later section of this chapter.

Choosing Suitable Meeting Rooms

Different learning activities require different types of meeting rooms and seating arrangements—from large auditoriums and fixed chairs to small

seminar rooms and movable chairs. For example, instructors who foster group interaction and team building do not want a huge room with chairs arranged in rows or fixed seats, preventing participants from seeing each other. They prefer chairs placed around tables or in circles in rooms that are appropriate for the number of participants. Such room arrangements provide much better learning environments for these kinds of activities. In addition, some kinds of learning activities require special facilities, such as space for prototype machinery or equipment.

In choosing meeting rooms, the planner has to consider a number of details (Cohen, Rogelberg, Allen, & Luong, 2011; Leach, Rogelberg, Warr, & Burnfield, 2009; MacKeracher, 2004). Attendees expect the seats to be comfortable, to be able to hear the speaker, and to not be distracted by physical factors such as heat, cold, dim lighting, smells, and sounds from outside the room. In addition, instructors, facilitators, and coordinators must present, communicate, and handle the program logistics to ensure optimum productivity.⁴

Program planners may have meeting room requirements that cannot be met by the facility available to them. For example, they may have to use the space available in their organization even though it is not the best environment for learning. In situations like these, it is important to think how the available space can be used to its best advantage. If the lighting is poor, can extra lights be obtained for the session? If the placement of outlets is inconvenient, are extension cords available and can they be placed so that people are not tripping over them? If the room is too warm, could quiet fans be used to cool it down? Could more comfortable chairs be borrowed from another room just for this session? If speakers require Wi-Fi connections, a computer, projector, and screen, can they be placed in the room and is the Wi-Fi connection reliable?

Arranging Meeting Rooms

The following question is often asked of program planners, "How do you want the meeting rooms arranged?" Sometimes, planners provide detailed drawings or names of the requested room arrangement to those setting up the facilities; at other times, they stumble in trying to describe the room setup and produce a quickly scribbled picture on a napkin or other scrap of paper. A lack of knowledge of language to describe meeting room arrangements reveals a novice program planner. This lack of detail or uncertainty could lead others to treat the planner as a newcomer to program planning and indirectly decrease their negotiating power. Experienced program planners usually know the names of the room arrangement to give to

whoever is setting up the space. Smaller meeting rooms may be desired to foster greater interaction between and among participants.⁵

By giving the standard room arrangement names such as *classroom style*, *theater style*, *U-shape*, and *fan shape*, most people who arrange the room will understand the arrangement desired. They will ask if there is a need for a “head table” for speakers. They will also want to know if risers are needed to lift the head table up for all to see and if podiums are needed, on the riser or off to one side. The next question will be about the number of chairs to have at the head table and then the types of microphones desired and AV setup for the head table. Program planners know these requirements before meeting with those responsible for the room arrangements. For larger programs room arrangements are made well in advance and then checked a few weeks before the program and again the day of the program.

Arranging for Instructional Equipment

In arranging facilities, program planners know whether the necessary instructional equipment (commonly called Audio Visual or AV Equipment) is available at whatever facility the program is to be held. This equipment is likely to be screens, computers, projectors, video players, special microphones, camera, televisions, and a way to connect to Wi-Fi. Some groups may require outlets to hook up laptops for the attendees. For education and training programs held at the host organization, this checking usually only involves scheduling the equipment, but equipment may also have to be borrowed or leased if the host organization does not own what is required. Sometimes an outside facility allows an organization to bring its own AV equipment, but this has to be approved in advance. If planning a multiday program, the organization needs to arrange with the facility where the program is located for a secure, locked room to keep its equipment for the second day. Equipment is expensive and can easily be stolen when rooms are empty during breaks or meals. If necessary, be sure to include any AV rental in the budget (see Chapter Twelve). In addition, some programs presenters need to bring their own equipment, which in most cases is a laptop computer.

Whether planners are arranging for in-house or rental equipment, several considerations must be taken into account: Will the equipment be in good working order on the day of the program? Are there proper cords, and compatible mobile equipment? Will the equipment be available at the times requested? If several sessions are presented at the same time and they need the same equipment, is there enough to cover all sessions? Who will be responsible for setting up and checking the equipment prior to

presentation times? Are these people knowledgeable in troubleshooting technical problems or do they really not know the equipment that well and cannot figure out how to make it work? Presenters expect that if equipment does not work that there is someone either in the room or close by to help them. Problems with any type of AV equipment can ruin a speaker's presentation and the experience for the attendees. It is a good idea to have an assigned staff member or volunteer to coordinate the handling of all of the AV equipment set-ups and to be available throughout the program to address all potential AV problems. In some locations there are actually in-house staff members that ensure all of the equipment is in working order throughout the program. It is good practice to ask these questions of the facility representative to make sure these details are in order, and to check again early in the day, before the program begins.

Negotiating Contracts for Rental Facilities

Negotiating contracts for rental facilities is another important task that program planners manage in finalizing arrangements for facilities for education and training programs. However, there are also spaces, as mentioned in the previous sections, where this task is not needed, such as in-house facilities, libraries, and community centers. Scenario 14.3 illustrates the need for giving careful attention to selecting a facility.



SCENARIO 14.3: A RETREAT IN THE WOODS

Deb needed a facility to hold a retreat for thirty judges for a weekend. She wanted to hold the retreat in the northeastern part of the United States where most of the judges lived and so it could easily be reached by car, train, or a short plane ride. However, Deb was frustrated by the costs for hotels in the Northeastern corridor. Most of them offered reduced government rates, for which the judges qualified, but the government rates were still beyond her budget. She mentioned this to the chair of her board who worked as general counsel for a prominent company. He was able to arrange use of their company retreat at a much better rate per person. Not only did the rate cover the room, but meals were also included. He assured Deb the facility was a favorite of his company employees and it was also in a beautiful wooded setting. Deb looked at photos online of the facility and decided that if the chair/general counsel and his fellow employees went to the retreat site, it would be perfect

for the judges. Deb broke her own rule about always visiting a site before booking it for a meeting and handled all negotiations for the contract over the phone. She had another program planner start the meeting with the judges and arrived on the second day. As soon as she arrived, everyone started complaining to her at once. The facility was in a beautiful setting, but the rooms were shared with baths down the hall, the facility was very stark and labyrinthine, and everyone, including Deb, got lost each time they left their rooms. The judges spent most of the weekend complaining to her about the facility instead of working on the program set for them.

As with “soggy potato chips,” the facility choice can make or break a program. The first part of this chapter has discussed the locality, the setting, the meeting rooms, the arrangement of the rooms, and the needs of the participants. Even handling all of these details still does not assure the site is a good fit without a close on-site inspection and a face-to-face discussion with the sales staff. Meeting planners today may have to depend upon someone else to assure them the facility fits the group and may need to negotiate the rental contract by phone. But if it is at all possible, the program planner ought to visit the facility and sit with the sales staff to negotiate the rental contract.

The Negotiation Process

Negotiating with the rental facility takes a certain amount of skill and knowledge of the information required by the sales staff and caterer. Program planners should enter the negotiation process armed with the required information, the confidence to negotiate skillfully, and the ability to make decisions about the contract. If planners are not experienced in negotiating with a rental facility, they should find a planner to help with negotiations and learn how it is done.⁶

Program planners think through carefully each of the steps as they move through this negotiation process. They pay attention to the details, gather the necessary information from the facility staff, and are aware of the goals and objectives of the facility staff they are working with, so they will not be misled.

Facility Contracts Are Legally Binding

Novice program planners have been known to think facility contracts can be negotiated after they are signed if they find they will not have as many

attendees as planned or if the event needs to be cancelled. Nothing could be further from the truth. These documents should never be taken lightly. These contracts are legal documents that if abused can cost an organization a great deal of money. Facility contracts are as sound as a contract to buy a house. In addition, these contracts are fairly standardized documents that have been honed through decades of business dealings. Program planners and sales and catering staff all expect things to go well and the program to go forward, but things happen and a solid contract can support and protect the facility or the program planners.

The first and very important segment to examine in any facility contract is the cancellation clause because things happen and sometimes cancellations are needed. The cancellation clause in facility contracts are written to protect the facility, but also to help organizations to scale down their obligation to the facility if the conditions in the contract cannot be met. Cancellation clauses have strict deadlines and if the need for the facility has changed, within the deadline, the organization can cancel the contract with no penalties or, in some cases, with lesser penalties.

Facilities set a request for a monetary deposit to hold the property for a designated date. The deposit is expected when the facility contract is signed, and the amount is determined by the facility based on a percentage of the income they expect to make on the business under contract. The larger the business, the bigger the required deposit. If facilities did not have this request for a contract and a deposit, anyone could walk into their facility and arrange to use the facility and not have to meet the obligation.

A Checklist for a Facility Contract

Program planners do not sign contracts without legal advice and without checking these contracts several times for the following items:

- Desired meeting dates are stated
- Number and size of meeting rooms are agreed upon
- Correct number of overnight rooms are secured for the accurate dates
- Complimentary rooms for so many overnight rooms are listed
- Deposit requirements are outlined and dates for payment stipulated
- Cancellation clauses are stated and penalties are given for cutting room numbers with dates; sliding scales are spelled out
- Liabilities are clearly articulated

- Schedules of events are listed with meals, breaks, receptions, and special events
- All costs, gratuities, and taxes are identified and fixed
- Conditions that might trigger price increases are clear; rates can be guaranteed for one year, possibly more, and this needs to be stated in the contract or the facilities can raise them without notice
- Master accounts and direct billing are arranged
- Agreements on late fees and charges are complete
- Mediation is agreed upon for disputes

Facility staff members, especially their sales directors and caterers, want to help program planners be successful with the event booked in their facilities. Novice program planners or instructors teaching program planning can ask the sales director and caterer from the local area to sit with them to explain the details of negotiating facility contracts. Staff members are usually very happy to provide this service to encourage future business. All information provided in this subsection can be points of discussion with program staff members as well as points of discussion with facility staff while touring the facility.

The negotiating of contracts with outside facilities is especially important for an organization if planning for large groups, such as conferences. Details in planning conferences multiply as conference size increases. The next section guides program planners in actually managing a conference before, during, and after the event.

Managing Education and Training Programs

All program planners, no matter what their program's venue, number of participants, or format, need to handle the logistics involved in managing education and training programs. In programs with a large number of participants, such as two- or three-day conferences or overseas educational travel trips, handling these details is usually shared among a number of people. However, for program events that are one day or less, planners may or may not have assistance tackling details, and some even have to deal with everything by themselves. This section explores the many kinds of details that program planners have to take care of through the example of planning large conferences.

Most personnel who coordinate education and training programs agree that carrying out a conference is very hectic. Juggling many unknown details can be a "nightmare," as shown in Scenario 14.4.



SCENARIO 14.4: THE NIGHTMARE

It is several nights before the opening of the Standing Conference on University Teaching and Research (SCUTREA) international conference in Cambridge, Great Britain, and Mary Ellen, who is an experienced program planner, had a nightmare that seemed quite real. It was the day of the conference and one problem after another occurred in her dream as the conference unfolded. Mary Ellen serves as the president of SCUTREA and as part of that role she is responsible for planning and managing the annual conference, a conference primarily planned and staffed by volunteers. When she arrives at her office the next morning, she busily checks all the last-minute program arrangements for the three-day conference. The conference is being held at the university, with some registrants staying in the dorm rooms and others scattered in three hotels surrounding the university campus. It is the first time Mary Ellen has used these campus facilities, so she has double-checked all the dorm room arrangements, the menus, and AV equipment orders. Mary Ellen had several volunteers from higher education institutions in London meet with her the day before in Cambridge to review the plans for the conference. They met with the catering director, Susan, at the campus, to make sure all was in order there. They had lunch in one of the hotels and met with Peter, the catering director for the hotel, to check a dinner to be held there. Mary Ellen recalled some of her bad dream as they went over the details and double-checked everything again. One of Mary Ellen's worries concerns a potential rail strike that is scheduled later in the week. She calls the office of transportation but cannot get any good information on the strike. She discusses this issue with the volunteers planning the conference and comes up with a contingency plan to get the attendees to the airport by bus after the conference ends. The luncheon meeting included generating problems that each person feels may happen, followed by a group discussion to outline another set of contingency plans to handle each problem. Mary Ellen returned home that evening and slept much better. She believes that her team is ready for just about anything that will happen at the conference.

Conferences are often planned by volunteers such as Mary Ellen and her team (Holmgren, 2011). As illustrated in the scenario, even as a volunteer

Mary Ellen was expected to oversee all arrangements and to work primarily with a group of volunteers. Using volunteers to manage conferences sounds like a good idea, but in reality, it can be a nightmare and more than one conference has been ruined by the volunteers who meant well but were consumed by all the details. Other organizations, such as corporate training centers, professional organizations, and university continuing education units, have professional staff members, internal or external, who serve as the conference planners and managers.

Although some organizations may have guidelines to plan “the annual conference,” most do not. Instead, they assume that whoever manages the conference will know what to do. The first and perhaps most important job for conference managers or designated program planners is to figure out what are the behind-the-scenes tasks that go into making a conference successful and the time needed to handle these tasks (Holmgren, 2011). Usually conference managers establish a number of groups to handle these tasks, each of which is charged with handling myriad details related to specific areas. These tasks include marketing; technology and products; hospitality and special events; program and assessment; and administration and housing.⁷

Most conferences are at least two to three days in length, so the details for the planning process multiply by the number of days. Conferences, except perhaps one-day events, always include overnight rooms for participants and facilities for the meeting (e.g., small and medium-size rooms for breakout sessions, large spaces for keynote speakers and social functions, such as conference-wide receptions); thus, they have to be planned well in advance to ensure that all of the arrangements for the conference are made in a timely manner. A two-day conference where participants spend one or two nights in town usually requires program planners to have at least one year in advance to set up the planning process, secure the dates, and book the hotel or conference site. For each additional day of the conference, planners can usually add another six months of preparation. Therefore, a three-day conference is best planned a year and a half in advance. The time needed to plan a conference is also affected by the number of people who are expected to attend the conference. The larger the conference, the more time it will take for the planning. To have less time for planning usually means that details are often overlooked, forgotten, or deemed unimportant. Time is especially important for programs that are managed by volunteers.

A time line of tasks for a conference that is completed by program planners, staff, or committee members is provided in Exhibit 14.1.

EXHIBIT 14.1**Conference Planning Time Line**

This time line is a list of all tasks to be completed in the preparation of a conference or program, in approximately six months. The time frames suggested may be altered to conform to particular institutional experiences or specific program needs. Those responsible for the planning process complete the tasks by a date listed and check off the task when completed. Tasks and lead time requirements vary depending on the size of the conference and the capability of those completing the task.

Task	Time Period	Date to Be Completed	Completed
1. Develop budget	6 months	_____	_____
2. Submit budget for approval	6 months	_____	_____
3. Select hotel or site	6 months	_____	_____
4. Meet with site staff to give specifications	6 months	_____	_____
5. Sign contracts with site	6 months	_____	_____
6. Prepare program proposal for sponsors	6 months	_____	_____
7. Issue general press release	6 months	_____	_____
8. Contact VIPs and send letter of invitation	5 months	_____	_____
9. Draft and refine brochure or flyer; set up web site	5 months	_____	_____
10. Compile final list for mail/e-mail	5 months	_____	_____
11. Meet with advisory group; decide on speakers, topics, and moderators	4 months	_____	_____
12. Complete brochure/flyer and get any printing estimates	4 months	_____	_____
13. Hold second meeting and confirm all speakers and moderators	3 months	_____	_____
14. Develop marketing plan; carry out	3 months	_____	_____
15. Record all disbursements; keep records	3 months	_____	_____
16. Write more detailed press release	3 months	_____	_____
17. Review room arrangements with site	3 months	_____	_____
18. Confirm the program schedule and meeting rooms with site	3 months	_____	_____
19. Mail/e-mail brochure or flyer; post on web	8 weeks	_____	_____
20. Request biographies from speakers	6 weeks	_____	_____
21. Arrange for speakers' rooms and travel requirements	6 weeks	_____	_____
22. Compile and copy handout material; prepare the CD	6 weeks	_____	_____
23. Arrange audiovisual (AV) equipment for all sites	6 weeks	_____	_____

24. Post notices in social media sites	5 weeks	_____	_____
25. Hire or find a volunteer photographer	4 weeks	_____	_____
26. Arrange for press room at conference	4 weeks	_____	_____
27. Send list of attendees to speakers	3 weeks	_____	_____
28. Send detailed press release to media and conferees; post on web site	3 weeks	_____	_____
29. Send final confirmation letter to speakers and have conference call or meeting	3 weeks	_____	_____
30. Assemble registration materials and packets	2 weeks	_____	_____
31. Make name cards for moderators and speakers	2 weeks	_____	_____
32. Prepare and copy roster of attendees and speakers	2 weeks	_____	_____
33. Assign registration staff	2 weeks	_____	_____
34. Print name badges	2 weeks	_____	_____
35. Contact appropriate committees regarding speakers' travel arrangements	2 weeks	_____	_____
36. Confirm AV equipment and special items, including directional signs	2 weeks	_____	_____
37. Print alphabetical list of attendees	1 week	_____	_____
38. Arrange news conference	1 week	_____	_____
39. Check hotel site	Day before conference	_____	_____
40. Check hotel registrations and arrangements	Day before conference	_____	_____
41. Pick up speakers on arrival at airport	Day before conference	_____	_____
42. Arrange dinner or breakfast meeting for speakers and key committee chairs	Day before conference	_____	_____
43. Arrange to get speakers to conference	Conference day	_____	_____
44. Staff the registration desk	Conference day	_____	_____
45. Check meeting room setups and AV equipment	Conference day	_____	_____
46. Keep track of number of registrants; greet speakers	Conference day	_____	_____
47. Provide secretarial services as needed	Conference day	_____	_____
48. Approve and sign all bills; be available at registration desk	Conference day	_____	_____
49. Hold news conference	Conference day	_____	_____
50. Send thank-you letters	2 weeks after	_____	_____
51. Finish conference proceedings and mail/post on web	Post-conference	_____	_____
52. Pay all bills; close books	Post-conference	_____	_____
53. Evaluate and issue post-conference releases	Post-conference	_____	_____

This time line can be adjusted according to the unexpected complexity of completing a task or tasks. In addition, the time line should be revisited on a regular basis to make sure none of the tasks are overlooked.

Managing Volunteer Conference Committees

One of the real secrets of success with planning a conference with volunteers is to make sure each volunteer knows exactly what they are to do, the limits of their duties, and when to notify the conference manager with problems (Holmgren, 2011). Problems can easily arise if the volunteers are not carefully supervised or, in the case of experienced volunteers, they assume too much responsibility.⁸

All volunteers try to do a good job in conference planning or they would not volunteer in the first place. Unfortunately, not all volunteers are good planners and can get into difficulties. The chair of the conference planning can be successful if there are periodic meetings held with the volunteers, the expectations of the roles for each volunteer are written down and given to the volunteer, committee responsibilities are made very clear, and time lines are established and checked periodically. All of the materials in this chapter can help a conference chair manage a group of volunteers and their committees.

Provided in the following subsections are examples of problems that might occur before, during, or after conferences and offer sample solutions to those problems, all of which relate to the details of conference management. The illustrations provided are not unusual, whether conference managers are volunteers or paid staff. It is important for conference managers to think about potential problems ahead of time and have solutions ready in case problems arise and need to be addressed immediately.

Handling Details Before the Conference

Displayed in Exhibit 14.2 are possible problems and sample solutions that might happen before the conference actually begins.

Many of these problems may seem daunting when they first occur, but can be corrected to ensure that the “the show will go on.”

Handling Details During the Conference

There are many more details that can be challenging during the actual conference as shown in Exhibit 14.3. Program planners can anticipate some of these challenges and prepare the staff for them just in case; others might be a surprise, but either situation does not mean the conference will fail. Program planners can have contingency plans for many of these details.

EXHIBIT 14.2**Examples of Problems and Solutions That Might Occur Before the Conference**

Problems	Solutions
The press releases go out too late to have the program covered by the media.	Create media announcements by calling key people who can contact people to welcome them to the conference.
The brochures are sent out and did not include the date.	Start making calls to target key people and sending out e-mails to the same group. Make a big, bright, splashy announcement of the date.
The keynote speaker's name has been misspelled on all the publicity materials; the wrong first name was used; the keynote speaker's name was not included.	Follow the same plan as explained above but start by calling the keynote speaker (call, do not e-mail) and apologize!
There are not enough registrants to make the program a go.	Check the budget to see what can be cut and what will still cost money. Try to redeem travel money: work with the rental facility to cancel overnight rooms. Cancel everything else that is possible to cancel. Move forward with a slimmed-down program at a lower cost and invite those who would not have been able to attend due to the cost, such as government workers or graduate students.
The keynote speaker cancels the day before the program.	Change the order of the speakers to fill the keynote address. Ask the keynote if either he can recommend someone else to give his presentation or if he can send his material so that someone else familiar with the material can give his keynote. Or see if one of his staff members who is working with the conference staff and actually prepared his presentation can give the speech, which sometimes is the case.
An emergency has occurred right before the program and affects attendance.	Start contacting people who are registered to see if they are still coming to the program. Determine your loss of attendees and either go ahead with a smaller group or reschedule.
The hotel renovations are not complete and the other hotels in the city are booked for a big conference.	Go to the facility manager and see what can be done to accommodate the group. Look for other sites rather than hotels for your event. Keep in mind that this situation would not have happened if the planner had kept in touch with the hotel staff.
The hotel lets go of your room block earlier than you planned and there are not enough rooms for your program attendees. This situation is not unusual if the hotel was able to sell these rooms to another group.	Notify your potential participants the rate has gone up; offer good room rates at other hotels close by.

EXHIBIT 14.3**Examples of Problems and Solutions That Might Occur During the Conference**

Problems	Solutions
The sound system goes out while one of the keynote speakers is presenting, and you have several hundred people in attendance.	Stop the program, move to the podium with a handheld mike, apologize, hand the mike to the speaker, and then move back to the AV manager/coordinator to find out how long the situation will last. Have the AV operators get more handheld mikes for the presenters.
The meeting rooms are too big or too small; too hot or too cold.	Call the facility contact person (at a hotel, this will be the caterer; in another facility this will be the person the planner has worked with during the planning process) and get the situation corrected. Do not approach the person emptying the trash or delivering the food—they cannot help you. Go to the top person for faster service.
One of the presenters is locked out of the meeting room.	Follow the solution to the second problem and wait unless there is someone in the area with a room key. Know where the house phones are and carry a cell phone at all times.
The printer sends too few program agendas and instructional materials.	Hold the materials back and initially do not give them to anyone but the speakers if there is a significant amount missing. Put the agenda on computer screens or Smart Boards, or project the agenda on the screen in each room until the session starts, and then pull up again when the speaker ends. Find a place as soon as possible that can print up or duplicate a simple agenda, which includes at least the name of the presentation and the presenters, the times, and the rooms where sessions will be held. Reprint those instructional materials that are a “must” for presenters to have for their sessions. E-mail or put on the conference web site the full set of instructional materials to all participants immediately after the program is over, with a note apologizing.
All the speakers show but there are very few attendees.	Put several speakers in one room for a panel presentation, even if their topics are not similar, and move participants to those rooms. Have a list on the doors of who the speakers are so the attendees can make a choice.

Problems	Solutions
Some workshop presenters do not have any attendees in their sessions.	Check each conference session to look for this problem once the sessions have started (have staff do this task). Ask participants in overcrowded rooms if some attendees will move to hear the other presenters with little or no attendees. Ask those presenters who had an overflow crowd if they can repeat their session at another time, then make the announcement and move the speaker without a crowd into a room with another speaker and ask them to share the time.
Presenters find themselves in a room with a divider that is not soundproof and participants can hear the presenter and whatever is going on in the next room (e.g., the speaker's presentation, the laughter of the audience, and video clips given as part of the presentation).	Call the contact person in charge of the facility and request that one of the groups be moved immediately. Cancel the session and offer it at another time during the conference and make sure attendees are aware of this change. Make a note that for future conferences that conference managers must complete inspections of the site up front, including all of the meeting spaces, so that this situation will not happen again.
The bagels donated for breakfast are frozen.	An ingenious program planner started up his truck and thawed the bagels on the hood of the truck! (Believe it or not, this solution, which actually happened, worked and the participants were never aware.)

Although this list could go on indefinitely, and strange things do happen, prepared conference managers may be able to handle each of these problems and still have a successful conference. As illustrated by the opening scenario, one of the ways to prevent panic among paid staff or volunteers helping with the conference is to prepare them for these unexpected events by discussing the possibilities ahead of time and having a plan of how to move forward to make the changes needed. The frozen bagel story makes a good point and gets a laugh, but it also helps to convey the importance of being creative in attending to even the most unexpected details.

In one conference, for example, graduate students in adult education who planned and managed a regional conference took great pride spending many hours outside of class coming up with creative ideas that added value to the conference. In thinking ahead about even the “smallest details” prior to conference, the students ensured there would be as few problems as possible during the conference, and in the end their efforts added value to the conference for both presenters and speakers. A sampling of these details is provided below.

- Keynote speakers were given the VIP suites at the hotel and had a basket of fruit waiting. The fruit was a welcome treat, as some of the speakers had arrived after a long plane trip.
- A student was assigned to host the keynote speaker, which included taking her to the hotel when her shuttle from the airport arrived, helping her set up before the presentation, getting a sandwich and snack before the presentation, and setting up the PowerPoint presentation in the meeting room.
- Students also hosted various presenters by picking them up from the airport or the shuttle and taking them to the hotel, sitting with them at the banquet table, and inviting other students, alumni, and guests to join them for meals.
- Students planned local recreational and cultural events, such as a boat trip into the islands located in the bay with a meal featuring local food and a historian to answer questions—and they even arranged for the boat to pause as the sun was setting so everyone could enjoy the beautiful sight.
- Students collected flowers from gardens, locally grown apples, pumpkins, and other decorations and special treats for room decorations and “goodie bags” for the attendees.
- Students and alumni drove attendees to their favorite local restaurants for dinner and to the conference site for a keynote speech and reception, and then delivered the attendees back to their hotel rooms.

There are many other “small touches” that make a conference enjoyable and memorable, but the main purpose of all of these details is to ensure a positive experience and to make the participants and the presenters feel at home and welcome.

Handling Details After the Conference

There are some details that can be problems after a conference is complete, but again, these can be anticipated and may be prevented. Examples of such problems and solutions are shown in Exhibit 14.4.

Most of the problems listed here should not be a surprise; program managers who are aware and involved in the conference should expect and be prepared for such issues. For each of these problems, further discussion might resolve the problems. It is possible that the hotel bill is incorrect and can be changed. You might want to have a discussion with some of the speakers to see what the problems have been, but it will not help to be defensive and argue. It is never a good idea to give money back to participants unless they have a very good reason. In one particular program, the hotel hot water

EXHIBIT 14.4**Examples of Problems and Solutions That Might Occur After the Conference**

Problems	Solutions
The hotel bill is much larger than you expect.	Go immediately to the main office of the facility and request to see the caterer or facility manager. Always go back to the person you worked with in person because the accountants will not provide the answers you need. Ask this facility manager to come with you to see the accountant as she will not discuss this issue unless the facility manager is there. Be aware that there could be a few added charges, but there should not be any big surprises unless mistakes were made by either conference managers or planners who misunderstood the charges to be made; answers lie somewhere in the billing process.
The major speaker was not happy because the technical arrangements were disruptive to his session (e.g., the session did not start on time, the sound system was poor, the person in charge of ensuring the AV equipment was working properly did not know how to do her job).	Avoid this problem by making sure that all of the possible technical problems are taken care of prior to the session. Seek out the speaker immediately after the session and apologize profusely. Provide the speaker with a time elsewhere at the event when she can hold a discussion session for interested participants who would like to get a better idea of the major messages she was delivering. Be aware that no matter what is done that this speaker may contact the organization's executive director and complain anyway; come up with ideas for how to respond to the speaker's frustration.
Problems surfaced during the program that could be traced back to either the facility staff or to the conference manager.	Have an "exit" meeting with the caterer or facility manager and start this meeting by complimenting him and his staff on the good services that were provided and noting how pleased the attendees were. Discuss issues that arose during the conference and how they were handled; ask whether the facility has a plan to remedy these problems in the future (e.g., the poor service of the wait staff at the banquet or the lack of a timely response to meeting room issues).
Several registrants complain about the poor quality of the program and want their money back.	If at all possible, avoid refunding registration fees and instead provide them with something that might "keep them happy," like a gift coupon to cover registration fees for the next conference. Apologize and keep in mind that at least some of the issues these registrants noted might not have arisen if they had been thought through prior to the conference (e.g., if planners had carefully screened keynote speakers, asked for copies of other presenters' materials so they could provide feedback if the materials were of poor quality). Walk around during the program and talk with participants and if complaints are voiced, remedy them immediately, where possible.

(Continued)

EXHIBIT 14.4 *(Continued)*

Problems	Solutions
Program evaluations are not good.	Review the evaluation results carefully and challenge those issues for which you have contradictory data (such as comments made during the conference that present a different point of view) and put these in writing. Use the results as a learning tool and think about how to make the conference better the next time; focus on making improvements.
Funding agencies are expecting a full report on the conference and reports received from the evaluators were negative in tone.	Be truthful about the evaluation but begin with the positive points and then list the problems encountered and what was done to handle the problems. If you disagree with the evaluations have counterpoints ready; ask others to help in developing these responses. List the problems at the end of the report and suggest solutions to make the next program much better.

heater went out after midnight and all registrants woke up to face cold showers. The hotel sales director appeared at the first session and assured everyone they would get the problem fixed and they subtracted the first night's charge from everyone's bill. No one had further complaints. However, if the problems listed here could not be addressed when they occur, program managers need to address them immediately after the program.

No matter how tired program planners, conference managers, and staff members are at the end of a conference, they cannot simply walk out the door of the conference site and not finish up the work. The following tasks are the minimum of what should be done:

- Go through facilities and where necessary put meeting rooms and other spaces back in order.
- Pick up and store extra materials (e.g. handouts, conference programs, and proceedings).
- Make sure any equipment and other types of resources brought to the site (e.g., banners, brochures related to future conferences) are accounted for and returned or stored properly.
- Give tips to facility staff who were particularly helpful and ask for their names so you can write letters commending them, which takes very little time but can mean a raise or promotion for them.
- Stop by the facilities sales staff or catering office or even the front desk and compliment workers on a good job and thank them for their help; even if there were problems, you can usually assume everyone involved in the facility tried their best to make the program successful.

Once program planners are back at the office, there are a few more things to attend to:

- Complete all administrative forms
- Reconcile and pay bills
- Conduct a staff debriefing
- Write letters of appreciation to presenters and other resource people, including notes to the hotel or conference site personnel
- Jot down suggestions for program improvements
- Read evaluations and compile the data
- Make reports to funding agencies and other organizational sponsors

As noted in the introduction to this section, no matter the venue, number of participants, or format chosen, all program planners attend to the details of managing education and training programs. This handling of details may appear trivial to novice planners, but they quickly learn—most often as a result of a failed program—that paying close attention to logistics is well worth the time. There are also program planners who are just not good at this kind of detail work. These planners need to realize that the only way they will be successful as program planners is to make sure they have people to work with who are willing and good at detail work (e.g., administrative assistants, another colleague, or trained volunteers).



Chapter Highlights

Handling the logistical end of the program often feels like a thankless task; yet if these chores are not done well they can negatively affect all aspects of education and training programs. One of the hallmarks of program planners who handle these types of arrangements is a thorough understanding of the importance of organizing and paying attention to the countless details that continually pop up throughout the program planning process. Eight specific tasks complete this component:

- Be aware of the challenges that may come into play when juggling all of the program details.
- Choose dates and locations that work.
- Investigate and obtain suitable facilities.
- Negotiate, when needed, contracts for rental facilities.
- Ensure all program logistics are addressed (e.g., a time line is in place for what details need to be done, where and by whom, and confirm that each of these details has been completed).

- Make sure all necessary staff, whether paid or volunteer, are in place to assist in managing the program details so that they will be handled well (e.g., registration, room setups, AV equipment, evaluations).
- Know how to work well with each of the individuals or committees who assist in taking care of program details.
- Anticipate any problems that might arise before, during, and after the program and have possible solutions in mind if any of them do occur; discuss these plans with those who are assisting with the program details.

This chapter on taking care of program details completes the discussion of each of the eleven components of the Interactive Model of Program Planning. In the final chapter, a review is provided of the Interactive Model and its key components and tasks, along with a brief glimpse at what program planning may look like in the future.

Notes for Additional Online Resources

1. See also Scenario 14.A: Workshop Woes and 14.B: Can You Hear Me?
2. See Exhibit 14.A: Examples of Data That Can Assist with Choosing Dates and Locations.
3. See Exhibit 14.B: Checklist for Selecting Facilities.
4. See Exhibit 14.C: Paying Attention to Meeting Room Details for a list of important details that planners check when arranging for meeting room space.
5. Figure 14.A: Layouts for Setting Up Meeting Rooms shows there are many room arrangements that can be used, depending on the size of the room, and how the program is to be presented.
6. See Exhibit 14.D: The Negotiation Process for a Rental Agreement for a Facility.
7. See Exhibit 14.E: Organization of Task Groups.
8. See also Scenario 14.C: The Fight; Scenario 14.D: Missing in Action; and Scenario 14.E: The Big Registration Mistake.



Application Exercises

The first two application exercises assist you in selecting program facilities and meeting rooms. The third exercise allows you to reflect on program arrangements that were made at a recent event that you either planned or attended. The fourth exercise focuses on how to handle problems before, during, and after the education or training programs.

EXERCISE 14.1

Selecting Program Facilities

1. Choose a program you are currently planning or work with someone who is currently planning a program. Using the following checklist, visit at least one possible program facility and evaluate its suitability for the program being planned.

Checklist for Selecting Facilities

Availability of program dates

_____	1st choice	_____
_____	2nd choice	_____
_____	Other	_____

Location

_____	Good transportation access (plane, car, ground transportation)	_____
_____	Participant appeal	_____
_____	Safe and secure (lighting, security staff)	_____
_____	Ease of parking	_____
_____	Affordable for the program budget and/or for participants	_____

Meeting rooms: General sessions, breakout rooms, social and entertainment areas (see Exhibit 14.B for a description of each of these features; see web site)

_____	Size	_____
_____	Appearance	_____
_____	Lighting	_____
_____	Decor	_____
_____	Furnishings	_____
_____	Ventilation, heating, and cooling	_____
_____	Sound projection	_____
_____	Electrical outlets	_____
_____	Wi-Fi connection	_____

Support services (at same or different facility from where the program will be held)

_____	On-site meals (catered by same or different group)	_____
_____	Accommodations	_____
_____	Restaurants	_____
_____	Recreation, fitness facilities	_____

(Continued)

_____	Phones, Wi-Fi access	_____
_____	Business center	_____
_____	Equipment services	_____

On-site transportation (frequency, convenience, cost)

_____	Public	_____
_____	Private	_____

Accessibility requirements under Americans with Disabilities Act (ADA)

_____	Accessible parking spaces	_____
_____	Ramps, lifts	_____
_____	Elevators	_____
_____	Accessible sleeping rooms	_____
_____	Accessible public restrooms	_____
_____	Doorway and corridor width for wheelchairs	_____
_____	Floor surfaces smooth and firm	_____
_____	Lowered public telephones	_____
_____	Telecommunications device for deaf (TDD), readable signs with large lettering, Braille, or raised symbols	_____
_____	Sufficient lighting in rooms and corridors	_____
_____	Emergency warnings in multiple delivery methods	_____

General factors

_____	Attractions and entertainment in area	_____
_____	Experience in hosting educational programs	_____
_____	Site personnel	_____
_____	Safety issues	_____
_____	Medical and emergency services	_____

2. Discuss your evaluation with others involved in this program planning process, or other colleagues who are program planners.

EXERCISE 14.2**Choosing Meeting Rooms**

1. No meeting room is perfect. Knowing that, choose from the chart your top seven requirements for a room that is adequate for the education or training program you described in Exercise 14.1. (See Exhibits 14.B and 14.C for descriptions of each item; see web site.)
 - _____ The room has barrier-free access.
 - _____ The room is a good size for the number of participants.
 - _____ The room structure, if possible, is square.
 - _____ Window placements and views are not distracting to participants, or there are no windows.
 - _____ The chairs are comfortable with good back support, and there is adequate work space available for every participant and instructor.
 - _____ The color of the room is cheerful.
 - _____ The room is clean and well maintained.
 - _____ The floors are tastefully carpeted.
 - _____ The lighting is good.
 - _____ There are no sources of glare in the room.
 - _____ The temperature of the room can be controlled.
 - _____ There is good air circulation.
 - _____ There is no background noise that might distract participants.
 - _____ The acoustics of the room are good and if movable doors separate the next room, there are no sound problems.
 - _____ There are plenty of electrical outlets spaced adequately around the room.
 - _____ There is a Wi-Fi connection.
 - _____ AV equipment is provided or can easily be used in the room.
 - _____ The room is close to restrooms, vending machines, and other needed conveniences.
 - _____ The furniture can be arranged according to specifications.
2. Compare with two or three others what you checked. Discuss first your areas of difference and then those that were similar. Examine what factors you think entered into the decisions that you each made.

EXERCISE 14.3

Overseeing the Program Arrangements

1. Describe an education or training program you recently attended or coordinated.

2. Using the following chart, reflect on this program you described in item 1, critiquing the program arrangements that were made. Write "NA" (not applicable) next to those items for which program arrangements were not needed.

Categories of Items	What Was Good About the Arrangements	What Problems Were There with the Arrangements?	How Could the Arrangements Have Been Improved?
Meeting Rooms			
Meals, Breaks, and Social Functions			
Sleep Accommodations			
ADA Requirements Met			
Roles of Instructors and Program Staff			
Equipment			
Materials			
Transportation			
Program Schedule			
On-Site Registration			
Message and Information Center			
Other (Please Specify)			

EXERCISE 14.4

Handling Problems Before, During, and After Programs

1. Briefly describe a program planning situation you are currently or have been involved in planning.

2. Related to this planning situation, using the chart provided, complete option either 2a or 2b related to the details planners handle in planning education and training programs.

- 2a. List a sampling of the problems you anticipate encountering before, during, and after the program and solutions you could use to handle these problems.

- 2b. List a sampling of the problems you had to take care of before, during, and after the program and solutions used to handle these problems.

Examples of Problems and Solutions

Examples	Solutions
Before	
During	
After	

3. Discuss your responses with others involved in this program planning process, or other colleagues who are program planners.