TRAINING SCIENTISTS TO MAKE THE RIGHT MOVES

A Practical Guide to Developing Programs in Scientific Management

Burroughs Wellcome Fund

Howard Hughes Medical Institute

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Chapter 8

MAKING IT HAPPEN

In This Chapter

You have decided on the content of the training and the format for delivering it. You have found a location for your event and have finalized the date. You have identified and secured your speakers and started enrolling trainees. It is now time to focus on the "logistics"—the array of details, from making travel arrangements to making nametags—that can make or break your event.

When considering logistics, try to think beyond what you know has to occur and plan for the unexpected. The audiovisual equipment that doesn't work, the no-show registrants whose meal costs you must cover, and the keynote speaker delayed by bad weather can scuttle your enterprise. This chapter offers some pointers on what you need to do before and during the event to minimize potential problems.

Note: This chapter covers a gamut of logistics-related issues for a multi-session course with speakers and participants coming from out of town. If you are holding an on-campus workshop with local speakers and participants, keep in mind that some of the sections won't be relevant—for example, on overnight accommodations, travel arrangements, hotel contracts, and working with meeting facilities. As with the other chapters in this guide, you should focus on the material that is applicable to the type of event you are planning.

STAYING ORGANIZED

Logistics at a Glance

An important aspect of staying organized and on track is thinking ahead about what you will need to do in terms of logistical arrangements. Here are some pieces of the event-planning puzzle to consider:

Registration.

- ❖ Registration process—how participants will register, how registrations will be confirmed, and how you will collect any fees charged

Hotel accommodations and travel arrangements.

- ❖ Hotel accommodations and travel arrangements for speakers and participants—who will make them, who will pay, and how arrangements will be confirmed

- Local transportation—availability of parking and public transportation; directions to the event; and how participants will get to and from the hotel, the airport, and the training venue

Meeting room(s), food service, and other requirements.

- Meeting room(s)—how many rooms are needed and at what time, and what room setup and seating capacity are needed

- Food service—the types and timing of meals, beverages, and snacks; who will provide them; and how the clean-up will be handled

- Conference facility—if you are going off-site, and the contract that details the requirements for meeting space, audiovisual equipment, food and beverage, and sleeping rooms

- Entertainment—whether there is a bar or game room where participants can go in the evening, and whether you will be planning any formal entertainment

- Other requirements for participants—such as a place to exercise, check e-mail, and make phone calls, and, possibly, a private room for nursing mothers

Speaker presentations and handouts.

- Presentations—what audiovisual and other equipment are needed, whether speakers will be able to use their own laptops, whether presentations will be audiotaped or videotaped, and whether an audiovisual technician will be required

- Copies of speaker presentations and handouts—how they will be generated and distributed, and how last-minute changes to these materials will be accommodated

On-site management and supplies.

- Supplies and administrative support—what items you will need on-site, and the staff needed to generate nametags and training materials and to be on-site to assist with the event

- Flow of traffic during the training—where people should go during breaks; if a multisession event, how to direct participants from one room to the next

Strategies for Keeping on Track

As you move forward in the planning process, and start to deal more and more with logistical matters, the number of details to keep track of will multiply. The following suggestions will help you stay organized:

- **Set up a system for recordkeeping that works for you.** You will want to develop efficient, accurate methods to keep track of each applicant, registered participant, and speaker; overnight accommodations; travel arrangements; and services from vendors—all while keeping a running tab on expenses (especially important when collaborating partners are involved). At the outset of the project, decide how you will organize e-mail communications, electronic files, and paper documents. Whatever system you use, if you see that it is not working, quickly replace it with a different one.

- **Keep referring to your timeline.** Remember to consult your timeline frequently to make sure that all the tasks are being handled and that you don't stray too far from your planning deadlines. Issue plenty of reminders to keep to the schedule for tasks on people's to-do lists.
- **Use checklists to help you stay on track.** No matter the size or complexity of your training activity, checklists can remind you of the details that need to be checked at specified intervals before, during, and after the event. (Sample planning checklists can be found in the resources at *http://www.hhmi.org/labmanagement*.)
- **Keep in touch with the people who are helping you**. If a travel office is taking care of travel arrangements for your event, make sure you discuss progress with its staff periodically and compare checklists. Do not assume that you are on the same track. You will also want to be in touch with people in facilities management, food services, and security.
- **Be flexible.** The agenda can be changed even up to the last minute; for example, breaks can be adjusted, speakers can be replaced if need be, rooms can be switched, and so on.

Tip Keep the records you generate for at least a year to help you plan the next event and, possibly, to share with other organizations that are developing training programs in scientific management.

SEVERAL MONTHS BEFORE THE EVENT

As early as possible in the planning process, you will need to give some thought to hotel accommodations and travel arrangements for participants and speakers (if people are coming from out of town), requirements for meeting rooms and food service, and handouts and other materials for the training.

Hotel Accommodations

If your participants and speakers need overnight accommodation, you will probably need to reserve a block of rooms for them at your campus facility or a nearby hotel. Depending on the location of your meeting (e.g., a busy city or resort versus a small town without much traffic), you'll have to secure rooms anywhere from a year to a few months in advance of the event. This is what the hotel will want:

- An estimate of the number of rooms you need and the number of nights each room will be occupied

- A deposit
- A written contract

Also see page 68, "Working with a Hotel or Conference Facility."

Tip

Be aware that hotels will often give you free meeting room space, or greatly reduced rentals on meeting room space, if you use a significant number of hotel rooms and nights.

Travel Arrangements

For travel arrangements you have three options, listed in increasing order of the time they will demand of you and the control you'll have. Consider the following:

- **Asking speakers and participants to make their own arrangements.** This option is the least time-consuming choice but carries the highest risk that it will not get done. In addition, if you are offering to reimburse all or partial costs, the people making the reservations may not look for the cheapest available flights.

- **Asking a travel agency either in your own organization or outside to make all travel arrangements**. If you choose this option, make sure that you or someone you know has worked with the agency before. It must be reliable, sensitive to people's needs, and looking for the best deals for you. This option starts off as a middle ground in terms of work for you, but it could easily turn into a lot more work if things go wrong.

- **Calling the airlines directly and making the travel arrangements yourself.** This option gives you the greatest control over what happens. The downside, of course, is that making travel arrangements can swallow a lot of time. If you decide to make the arrangements yourself, be sure to check your organization's travel policies and use them as a guideline.

Tip

If you ask speakers and participants to make their own airline reservations, make sure you give them guidance on the best arrival and departure times to avoid rush-hour traffic. Remind them to allow themselves plenty of time to travel between the airport and the training venue.

Meeting Space

As soon as your event is a go, develop a preliminary master agenda that outlines the training sessions and meals and snack breaks for your event. For each, include beginning and ending times for the sessions and breaks, the type of room setup required, and the number of people expected. To do this, you will need to think through the following issues:

- **Number of room(s) needed.** Think about how many rooms you will need at different times, for sessions and for other activities. You may need rooms that accommodate a projection screen and computer for slide presentations. Trust the facility liaison's recommendations on space: If you pack 100 people in a room that "seats 80 comfortably," you will have 100 uncomfortable people. (Also see page 27, "How Large a Group?")

The planning checklists in the resources at *http://www.hhmi.org/labmanagement* can help you sort out your meeting space needs.

- ❖ **Room setup requirements**. Certain seating arrangements and room sizes will work best for different sessions—for example, theater-style seating does not work as well as several round tables if you want to have small-group discussions. You may have to choose between U-shaped versus classroom-style seating arrangements, large round or square tables versus several small tables, tables with chairs versus chairs alone, and a head table for speakers versus a podium. Regardless of the setup, make sure you have enough chairs for all participants. This is particularly important for hands-on activities.

Tip Keep in mind that it takes time to arrange each room as desired and you may not be able to change the setup from one session to another. Changing the room setups may also incur additional charges. So spend some time choosing rooms and their setups. Consider keeping all lecture-format sessions in one room and all small-group sessions in another.

- ❖ **Flow of traffic.** Think about how you will get participants from one room to the next—for example, placing signs and having moderators make announcements. Consider using signs with removable arrows.

- ❖ **Audiovisual equipment.** Find out what equipment your speakers will bring with them, and what you will need to provide. Typically, speakers will ask for a computer for their PowerPoint presentations, an LCD projector, and a screen. In some cases, speakers also may request an overhead projector and some transparencies and markers. You will need to find out about computer compatibility (e.g., if your keynote speaker brings an Apple laptop, can you project from it, or is your system specific to IBM clones?). Some of the more unusual requests are videotape players and TV monitors, as well as teleconferencing or videoconferencing capabilities.

  Make sure you ask speakers detailed questions and get as much information as possible about what they plan to do (also see chapter 6, "Finding and Working with Speakers").

  Beyond the speakers' requests, consider having the following in each room or on hand: remote controls, microphones (e.g., handheld/portable, aisle, tabletop, lectern), laser pointers, power strips or extension cords for laptops, recording equipment (e.g., audio, video), sound system, and audiovisual technical support.

Tip Remember to have water and glasses available for the speakers.

The Role of Refreshments

Meals and refreshments enhance informal social interactions and fuel intensive skills-learning sessions. As you fine-tune your agenda, think about the types and timing of breaks and meals. Food is a factor in how people rate the success of a meeting. Participants may interpret a food glitch as evidence of poor planning for other aspects of the event. On the other hand, food service is also one of the biggest event expenses, but smart planning can help you control costs. The goal is enough food to go around without the waste of paying for excessive leftovers. One program planner handles the enough-but-not-too-much dilemma with the following formula: Expect an attrition rate of 10 to 20 percent after registration ends and adjust food numbers accordingly. (Also see page 36, "Tips for Cutting Costs.") Consider decreasing the guarantee for breakfast, which many people skip.

Feeding Frenzy

"The biggest disaster would be to have an insufficient amount of food or coffee. Trust me on this one—running out of food is worse than any dull speaker ever could be."

—Melanie Sinche, University of North Carolina–Chapel Hill

Q&A

What do I need to know about food and beverage charges at a hotel or conference facility?

You will be charged for the amount of food and beverage service you guarantee and the actual number served in excess of that guarantee. Be aware that conference facilities may overset, upon request, by three to five percent over your guarantee. Check with the facility to find out when it needs to receive your final guarantee. Usually it is 72 hours in advance of the food function.

Tip

During the registration process, you will probably have asked attendees whether they have special dietary restrictions or requirements. Regardless, try to include a vegetarian option for every meal. If a participant has a dietary concern that you do not understand, call and ask directly what he or she needs.

WORKING WITH A HOTEL OR CONFERENCE FACILITY

If you are working with a conference facility, share with the facility liaison your preliminary master agenda (including dates and approximate times of your plenary and breakout sessions and meal and break functions) and the number of attendees you expect, and request your preferred dates for the event. (If this event has been offered previously, provide the facility with actual numbers for overall registration, sleeping rooms used, and persons served at the meals and breaks.)

Tip

Some universities have conference coordination offices. Services might include managing registration, arranging for meeting space and refreshments, negotiating a hotel contract, making travel arrangements, and printing marketing materials. The availability of these services and their costs will vary.

Typical Components of a Contract

When you and the facility agree on the dates, the facility's liaison will present a contract for your signature. Major components include:

- ❖ Dates of your event
- ❖ Space reserved for each session—the meeting room assigned for each session *or* the minimum room size (square footage) that each session event will need; the date and time the room will be needed; meeting room rental fees, if any; and room setup
- ❖ The number of sleeping rooms set aside for your group each night. Details include:
  - Single versus double rooms
  - Nightly rates (including tax)
  - Check-in/check-out/cancellation policies
  - The cut-off date at which you can decrease the number of sleeping rooms needed (in case you do not get the response you were hoping for from potential registrants)
  - The cut-off date for your group, at which time any unreserved rooms are released for sale to the general public unless you guarantee to pay for them
  - How reservations will be made—for example, online, toll-free telephone number, directly with hotel, rooming list submitted by meeting organizer
  - The number of complimentary rooms your group will receive based on total sleeping room usage
- ❖ Food and beverage events your group agrees to host, their costs, and the facility's policy regarding cut-off times for modifications in amounts ordered
- ❖ Audiovisual needs:
  - Equipment and technician
  - Audio recording versus video recording, if desired
- ❖ Cancellation/penalty situations if
  - You must cancel the event
  - You do not use your projected number of sleeping rooms
  - The hotel room and food and beverage expenditures fall short of expectations because of fewer attendees

Before you sign the contract, review it carefully. Be very clear about the amount of money you will still owe if you do not meet your minimum guarantees for hotel rooms and food and beverage functions.

Tip It is possible to purchase event cancellation insurance. If your event is appended to some other event, such as a professional society meeting, you might want to ask the society's decision makers about their approach to such policies and, if they have decided to purchase insurance, make sure your event is included among the covered dates and activities.

Give Detailed Instructions to the Facility Liaison

Approximately three weeks before your event, send detailed instructions to the conference facility. These will include the timing, setup, seating, and audiovisual requirements for the training session rooms; food and beverage selections and prices; event posting and signage; the delivery of training materials; and parking arrangements.

The conference facility liaison will use this information to prepare setup and banquet event orders—written instructions for the facility staff to ensure that your requests are carried out. Review these instructions and speak to the liaison about changes and discrepancies. You may want to meet with the liaison to go over your requirements in person.

Tip Good communication is key to working successfully with a conference facility. Make sure you inform the facility liaison of any changes in your logistics needs, from changes in the agenda to the number of expected participants.

TRAINING MATERIALS AND GIVEAWAYS

You will have to think about printed materials to distribute, post, or have on hand at the training event. In addition, at many meetings and workshops, organizers provide pens and notepads, tote bags, or books. Tote bags are especially handy if participants are going to be carrying around a lot of material during the event. Order these items well ahead of time. Note that pens and notepads are often complimentary at hotels and conference centers, so check first before you order.

Training Materials: How to Distribute?

Think about how you will distribute the training materials. For instance, will you organize all handouts in one notebook to give to participants when they register or make individual copies of handouts available in the meeting rooms? If you choose the first option, you'll need more time to put the notebooks together and extra people to help with this task, but you'll be sure that everyone gets copies of the handouts. If you choose the latter option, ask yourself the following: Will you be passing them out to participants as they enter the meeting room, placing them on participants' chairs, or placing them on a side table for people to pick up? Giving participants responsibility for picking up handouts raises the risk that some people won't get them. Also, if tables for handouts are positioned near an entry way—as is logical—people tend to cluster there and create a bottleneck that impedes the flow of traffic into the room.

Alternatively, instead of distributing hard copies on-site, you could post the information online for registered attendees to access before the training event (you should still have plenty of copies on hand for those who forget to bring their own). Participants appreciate receiving copies of the speaker presentations so that they can take brief notes and listen instead of trying to copy all the information from the slides. (See page 51, "Preparing Your Speakers," for a discussion on when to ask speakers to submit their materials.)

Reproducing the Training Materials

To avoid time and budget shortfalls, experienced planners offer the following advice:

- ❖ Tell staff at the copy center—whether it is at your institution or an off-site vendor—well in advance what materials you want reproduced, how many copies you need, and when you need them.
- ❖ Ask about cost-saving options, such as lighter cover stock and stapled binding, and whether there are cost breaks for certain amounts of copies.
- ❖ Make sure the originals are ready to copy. Some PowerPoint slides do not print out the way they appear on the screen. Sometimes the background is too dark or symbols and other content go missing in a printed copy. If you want double-sided copies, be sure to insert blank pages where needed.
- ❖ Print a few more copies of each piece than you think you need. Some defective copies usually escape inspection, and people misplace handouts and grab extras for colleagues.
- ❖ Allow time to inspect the copies in advance, preferably at the copy center, so that mistakes can be corrected and unacceptable copies can be replaced.
- ❖ Try to have a photocopier available during the training event. No matter how well you prepare, there will be some last-minute photocopying (e.g., a speaker will bring a handout that you did not know about or an exercise for participants to do that needs to be distributed).

Tip

An important point to remember about photocopying printed materials: Federal laws and regulations may preclude you from photocopying materials unless you have permission or are within the "fair use" rules. (For more information on fair use, see the U.S. Copyright Office explanation at *http://www.copyright.gov/fls/fl102.pdf*.) Also be aware that photocopying materials can be (1) labor-intensive if you do it yourself and (2) costly if a commercial copy center handles the reproduction and collation.

Storing the Materials for Easy Access

Once you have your printed materials to distribute, devise a system to store them so that they will be easy to locate the day of the event. For example, for a multiday event you may want to store your handouts in several boxes, each labeled with the session name, time, and place. Color-coded folders work well for keeping track of materials for multiple sessions in a single day.

TROUBLESHOOTING: DEVELOP A CONTINGENCY PLAN

During the weeks before the event, think carefully about what could go wrong and develop a backup plan. For example:

❖ *How can I avoid incompatibility between a speaker's presentation and the computer in the meeting room?*

Before the event, ask the speakers to e-mail you their presentations so that you can load and test them on the computer in the meeting room ahead of time. If a speaker's presentation includes animations, embedded video clips, or other special visual elements, make sure the software runs properly. As a back up, speakers should bring their presentations on a portable storage device.

In addition, contact speakers before the event to find out if they are bringing revised versions to the event. If so, arrange to meet the speakers as soon as possible at the event to obtain their revised presentations so you can test them for compatibility.

Remember, you should also have hard copies of presentations ready to photocopy and hand out in case the audiovisual equipment malfunctions or there is an electrical outage.

❖ *How can I minimize the number of people who register for the training but don't attend, sticking me with food costs I have to guarantee to a caterer in advance?*

Charging a registration fee might provide an incentive to show up. Also, for an on-site event, reconfirm with registrants and remind them about the session beforehand. Make sure they know they are occupying the place of another interested person. For an off-site event, if you are using a travel agency, obtain copies of all itineraries so you know who has made reservations. Double-check with those who have not.

❖ *What will I do if a pivotal speaker falls ill shortly before the event or is kept away by travel delays?*

This is one reason panels are a good option. Because you worked with your speakers prior to the training, discussing in detail who covers what, and you have already received the missing panelist's materials, the remaining panelists have the information they need to cover the extra topics and split the extra time.

Keynote addresses or single-speaker sessions are more of a problem. You might be able to find a suitable replacement from the group of potential speakers that you developed in the planning phase. Be careful not to offend the replacement speaker, since he or she was obviously not your first choice. Share the talking points for the topics to be covered in the session. If you have already received the original speaker's slides, offer them to the replacement speaker. You may also want to consider whether the session can be skipped this time and rescheduled for another training event.

❖ *What will I do if the food I ordered for an evening or weekend event doesn't show up and the business is closed or the contact person doesn't answer the phone?*

Have staff on hand who know the area and have cars in case they need to dash to a nearby store for food. Have keys for the kitchen area, or at a minimum, whatever you need to make and serve coffee and tea while you're waiting for them to return. Best advice: Double-check your order the day before it is due, and make sure you have a cell phone number (or other surefire way) to reach the contact person.

Persistence and Luck Save the Day

"When I helped Science*'s Next Wave run an 'Interviewing Skills for Scientists' panel, I had four scientist panelists and one human resources panelist. The event was on a Tuesday, and a panelist cancelled the Thursday before. I queried three people from my list of potential speakers; none of them could attend. There was one speaker that I had been playing e-mail tag with for more than a month, and I had finally given up. I decided to try one last time the day before the event. Luckily, my e-mail got into his inbox just as he returned from a trip to Europe, and he accepted right away. I could have done the panel without that fourth scientist, but the last-minute substitute ended up being the stellar panelist of the evening."*

—Lisa Kozlowski, Thomas Jefferson University

THE RUN-UP TO THE EVENT

Prepare Nametags and Tent Cards

All people attending a meeting should wear nametags, including organizers and other staff. Making nametags requires decisions about design and what information to include beyond the person's name. For example, you may want to include title, affiliation, city; category of attendee (e.g., presenters, participants, staff); and numeric or other coding (e.g., Ph.D. or clinician researcher) for evaluation purposes (see chapter 9, "Evaluating the Training"). In addition, make sure the lettering on nametags is legible at a distance of a few feet; this will also limit how much information you can fit in.

Keep in mind that the more information you include, the greater the likelihood that you will get some detail wrong and will have to redo the nametag. Remember to have extra nametags on hand at the meeting because you will be asked to redo a few no matter how careful you are. Consider taking a laptop computer and small printer on site to generate new nametags.

Tent cards are used to identify speakers on stage during a panel session or even at the podium. Make these in advance and make sure they display the name in a way that is clearly visible from the back of the room.

Prepare Welcome Packets

For each participant, include the following:

❖ Nametag in badge holder

❖ Agenda

❖ List of session objectives

- List of speakers and biographies
- List of training participants (and contact information, if desired)
- Copies of speaker presentations and any additional handouts (if you are not distributing them during the sessions)
- Evaluation forms
- Notepad and pen
- Announcement of the next training event (when, where, and how much)
- Floor plan of training facility
- Ground transportation information

Arrange Ground Transportation

If participants are staying at a hotel and the training event is at a different location, you will need to arrange transportation to and from the hotel. To cut down on costs, you may want to rent a minivan or bus that makes the trip several times a day on a given schedule (the schedule will be dictated by your meeting's agenda).

Some planners arrange transportation from the airport at the start of the meeting and back at the end. Other planners coordinate taxi sharing to take participants to airports at the end of the event. It is helpful to reconfirm details at some point during the meeting; people's schedules can change while they're at the event.

A Few Days Before the Event

As the event draws nearer

- Meet with the facility staff who will be on duty during your event to introduce yourself, go over the final agenda, and find out who the "go-to" people are for specific problems that may arise. In particular, you will want to meet with the person who will be loading the speakers' presentations into the computer and go over the session agenda and the order of speakers.
- Find out how the heating or cooling of rooms is handled. For example, if these are on an automatic timer, ask the facility liaison to arrange for the appropriate temperature to be set manually the day of the event.
- Establish clear lines of responsibility for the event with your organization's staff—who is in charge of what. For example, someone with decision-making authority should be accessible for logistics troubleshooting at all times, including breaks between scheduled activities.
- Have a short meeting with your session moderators, organization staff, and others who will be on hand to go over what they are supposed to do. For example, who will staff the registration table? Who

will collect evaluation and speaker reimbursement forms? Who will introduce speakers? Go through the agenda and tell everyone what will be happening. You also may want to walk through the facility to make sure everyone knows where sessions and breaks will take place.

❖ Tell colleagues how to reach you or someone you delegate to resolve difficulties such as last-minute requests by speakers or emergencies.

A sample list of what to check and when can be found in the resources at *http://www.hhmi.org/labmanagement*.

Q A

How can I make sure that essential information is consistently and correctly shared with participants?

Distribute to session moderators scripted announcements to be read at the beginning and end of each session. An opening announcement might include the following: a thank you to sponsors, housekeeping details (e.g., location of restrooms and phones, a request to turn off cell phones), and how audience questions will be addressed. A closing announcement could include the location of the next session and a reminder to complete the evaluation form. If you are planning another event, announce the date and place. If you do not have a firm date, direct people to a Web site address.

Avoiding E-mail Distraction

"Participants need to be discouraged from checking their e-mail during the training sessions or running off to do it during breaks, so don't advertise the availability of Internet access in any meeting rooms or common areas. Participants should be focusing on the training and the networking opportunities. E-mail should be checked before and after the day's training—not during breaks, not even at lunch."

—Maryrose Franko, HHMI

THE DAY OF THE EVENT

The following tips can help ensure that the event runs smoothly.

What You Need to Double-Check

On the day of the training event—well before it starts:

❖ Conduct a walk through to check that the rooms are set up correctly, with enough chairs for panelists, trainees, and staff, and that the audiovisual equipment requested by speakers is in place and in working order. Also make sure there is water in each meeting room.

❖ Test the presentations you loaded in the computer one final time.

❖ Check that any food service you requested is set up; any signage you ordered is in place and visible; and sufficient training materials and evaluation forms are available and placed in the correct location.

❖ Check that the registration area is correctly signed, set up, and staffed. Set up a message board in the registration area and designate someone to manage it.

Tip Make sure you show up early enough to allow plenty of time to double-check everything. You can't walk in 5 or even 15 minutes before an event starts and expect to be able to deal with any problems you find.

What You Should Have On-Site

Have the following just-in-case items on-site:

- Blank nametags to replace any that are lost or have incorrect information
- Extra nametag holders
- Extra welcome packets
- Copies of materials (or originals to copy) in case some are missing from the handouts you've assembled or are damaged
- Master CD(s) containing all speaker PowerPoint slides, agenda, and other documents related to the training
- Portable storage device (e.g., USB flash drive) for speakers who forget to download presentations from their laptops
- Registration and payment information, if applicable
- Notepads, pencils or pens, dry markers and erasers, flipcharts, appropriate masking tape to affix pages to walls, and tabletop tent cards
- A list of all participants and speakers and their travel schedules and speakers' cell phone numbers to call in case a speaker does not show up
- Essential phone numbers (e.g., vendors, taxis, airports, hospital) available to staff

For sample checklists of what to double-check and have on-site, see the resources at *http://www.hhmi.org/labmanagement*.

What You Can Do to Manage the Event Better

During the event

- Be realistic about what you should be doing during the event. Chances are that one of your main responsibilities will be to attend the session(s) and interact with participants. Therefore, you should not be the problem solver unless there is an emergency. For example, do not collect evaluation, reimbursement, or any other forms during the training; refer participants to the staff person who has this responsibility.
- Carry a walkie-talkie or a cell phone (but remember to set it on "meeting mode"). Emergencies happen, and you may need to address problems while you're in transit or without access to a telephone.

Tip

With a multiday event, consider having a short (30-minute maximum) debriefing with speakers and staff to identify any adjustments that need to be made for the following day. This enables everyone to relax, regroup, and feel better prepared.

Q&A

How can I keep speakers to their allotted times so that enough time remains for Q&A?

Use a timer that gives them a signal when it is time to wrap up. Make sure the speakers know how much time they have remaining when the signal goes off (five minutes remaining is a good rule of thumb). A low-tech solution might be to use a hand signal to indicate the number of minutes remaining or have the session moderator move slowly toward the podium.

AFTER THE TRAINING EVENT

The adjournment of the training activity does not mark the end of your responsibilities. You still have to collect, process, or create the following:

- ❖ Thank you's to speakers and sponsors
- ❖ Thank you's to participants
- ❖ Evaluation forms (if methods other than exit surveys are used) to compile an evaluation summary of the event
- ❖ Extra training materials (e.g., recycle, destroy, return to sponsoring organizations)
- ❖ Speaker honoraria and expense reimbursement
- ❖ Hotel and training facility bills
- ❖ Transcript or other written, audio, or video record(s) of the event
- ❖ Photographs
- ❖ A meeting history for future events: Update the master schedule to include actual numbers at each session; document the actual number of hotel rooms used each day.

Finally, there is the debriefing. Set up a time to go over the training evaluations and discuss with staff what did or did not work and start to think about how to apply what you've learned to the next training event (see page 91, "Continuous Improvement: The Feedback Loop in Operation").

Tip

Consider sending out a CD containing the course material to your participants after the event. In addition to the speakers' slides, you can include any additional material the speakers brought. (Make sure you have permission from the copyright owner for any copyrighted material.)