



Society Strategies

Federation of Genealogical Societies

P.O. Box 830330 Richardson TX 75083-0220

Series Set VI Number 5

April 1996

Strategies for Program Chairs

Planning Successful Seminars and Workshops Part One - Initial Steps and Publicity Part Two - Vendor Options and Accommodations

by Patricia Law Hatcher, CG

Supplemental Page

This strategy paper, written some years ago, is an FGS *Classic* that contains ideas and strategies still relevant today in society management.

This paper offers advice for planning a successful society seminar, workshop, beginners' workshop, or symposium. The details outlined here help the program chair to prepare a checklist that will guide the preparations from beginning to end.

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Planning Successful Seminars and Workshops

Part One - Initial Steps and Publicity

by Patricia Law Hatcher, CG

INITIAL PLANNING

A genealogical seminar or workshop fulfills two primary goals of the local society: education and fund-raising. It may be the largest “project” a society undertakes, and the coordinator can become overwhelmed. This section of part one contains tips and suggestions to help with the initial planning.

The seminar or workshop coordinator must make five key, often interrelated, decisions at least six months to one year in advance of the event: format, speaker(s), topic(s), place, and date.

Several **formats** are possible: single lecture, beginners’ workshop, symposium, or a genealogy fair. This last format differs significantly from the others and is not covered in this series. It was discussed in “Society Project: A Family Heritage Fair” by Betty Robertson Kaufman in the FGS FORUM 3:1 (Spring 1991).

The **single lecture** format is used most often. All participants attend the same session, which is usually given by a single speaker.

A **beginners’ workshop** can be the most rewarding for a local society. It introduces people not only to genealogy, but also to the society. Often an experienced lecturer can be engaged to present an all-day workshop. Consider, however, having four to six of your society members each present a segment. They may be willing to donate their time to the society or to accept a lower fee than a well-known speaker. This reduces expense, serves as a non-threatening environment for training future speakers, and allows beginners to identify more easily with the speaker. When this format is used, the coordinator must outline the material to be covered very thoroughly, but should allow each speaker to create his or her own presentation. One-day beginners’ workshops often try to cover too many topics in too much depth, leaving the listener overwhelmed and confused. A good rule of thumb is to cover only material that almost everyone in attendance would use in the first year of research (county deed books, but not less-accessible land patents or tax records).

The **symposium format** also takes advantage of local expertise. Similar to national conferences, three to five talks are offered simultaneously in, for example, two morning and two afternoon sessions. One benefit is that topics that may be too narrow in interest for a program or workshop can be presented (such as Swedish research or Catholic records), in addition to broader topics (courthouse research). Remember to include at least one beginner or basic class (resources at the local genealogical library) during each time period.

Speakers may be found locally, within the state, or nationally. A national speaker's list is available from the National Genealogical Society, 4527 17th Street North, Arlington, VA 22207-2399 postpaid for \$10.00 for non-members and \$8.00 for members. The Genealogical Speakers Guild, 3421 M Street N.W., Suite 329, Washington, D.C. 20007 has published a directory of its members. One copy is available at no cost to a society, library or archives requesting it. Individuals may purchase a copy for \$10.00. Some state societies also maintain speaker's lists.

Nationally-known speakers attract interest to the workshop, but are in great demand. Their fees and expenses are higher than for local speakers. Popular speakers often must be booked six months to one year in advance.

Ideas for **topics** can be obtained from member surveys, the chosen speaker(s), or from conference programs presented by the Federation of Genealogical Societies or the National Genealogical Society. In general, topics fall into three categories: locality, sources, or methodology. The first is easier for a speaker to present, the last has broader appeal. Avoid topics recently presented in your region.

Facilities, like speakers, often must be booked six months to one year in advance. Libraries, community centers, churches, schools, fraternal lodges, and hotels have been used

successfully for workshops.

Factors to consider in choosing a facility include: format chosen (affects number, size, and furnishings of rooms), number of attendees anticipated, type of seating arrangement (theater style or with tables), handicap access, rest rooms, facilities for meals and refreshments, space for registration and vendors, parking, and audiovisual equipment.

The **date** selected for a workshop often depends upon the availability of the facility and speaker. Avoid months when unexpected ice and snow could hinder attendees or the speaker from travelling. Because genealogists are frequently active in a number of organizations, it is virtually impossible to select a conflict-free date, but it is wise to check with those society members who would be helping with key tasks to minimize conflicts with their schedules.

As indicated earlier, the important decisions that must first be made about format, speaker, topic, place and date are highly interrelated. The sooner initial planning can begin, the greater the options. As soon as the speaker(s) and facility have been determined, the coordinator should write a letter to each, confirming the date and terms. Once these tasks are completed, the coordinator can tackle other aspects of the event and begin delegating duties, such as publicity, vendor options, accommodations for speakers and attendees. These factors will be discussed in subsequent papers.

PUBLICITY

To fulfill the dual seminar or workshop goals of education and fund-raising, you must get people to attend. To secure as many people as possible to attend, you must have publicity—lots and lots of publicity. Good publicity generates enthusiasm. It is not enough merely to inform genealogists of the event. You must make them want to come. Publicity, more than any other factor, will make your event a success or a failure. It will determine if you meet both—or

either—of your goals of education and fund-raising.

Direct marketing principles assure us that it takes three “impressions” to make a sale. It helps if the impressions are within weeks of each other and if they are not just copies of the same flyer. Common forms of publicity for seminars and workshops are flyers, direct mailing, newsletters, meetings, and publicity notices. Before any major publicity can begin, a number of details must be finalized: the place, the exact time schedule, the exact titles for the talks, details about lunch, vendors, and the cost of registration. Unquestionably, the title used by one professional lecturer, “Grandma, Where Are You?” has more audience appeal than “Finding Females in the Midwest in the 19th Century.”

The number of walk-in registrations is increasing, which makes planning difficult. How many handouts should be printed? Is seating sufficient? Will there be enough lunches? To minimize this problem, set a preregistration deadline three or four weeks in advance in order to complete arrangements in a relaxed manner. Set a cost incentive sufficient to attract more preregistrations (\$2-3 is not enough, \$4-5 may be).

An eye-catching flyer will be instrumental in attracting more genealogists to your workshop. A significant percentage of those attending seminars or workshops will be nonmembers of the sponsoring societies. The flyer will be the only available way to contact those genealogists.

The purpose of the flyer is two-fold: to give potential attendees **complete** information about the workshop and to interest them in coming. Obviously, a sheet of paper listing name, date, and place is insufficient. Your information must include paragraphs about the speaker and about each topic, and details about the schedule, location, meals, handicap access, and any special features.

An effective flyer need not be expensive to prepare or print and will bring many additional persons to your workshop. Colored paper helps attract attention to your flyer and increases the cost only nominally. Some feel that the color yellow makes the best impression. Colored ink adds significantly to the cost and is more difficult to read. Neatness counts. The flyer should be prepared enough in advance to be at the printers two months before the event. Proofread! Proofread!

Flyers can be distributed in a number of ways. They should be placed appropriately on display for “pick up” at local libraries and other sites. They should be mailed to members or inserted in the newsletter. They should be mailed to nonmembers. Maintaining a mailing list of nonmembers is a volunteer task that is best undertaken as a year-to-year job. It requires a significant amount of effort, but is much easier if you don’t have to “reinvent the wheel” each year. Every nonmember or former member who attends a workshop, visits a meeting, or uses the library should be on this list. This list is important and the number of names should grow regularly.

Use your newsletter to expand upon the basic information included in the flyer. Provide additional information about the speaker, perhaps even an interview. List the number of vendors attending, who they are and some of the items they will have available. Promote the workshop as an opportunity for genealogists to share experiences and information with old friends and distant cousins.

At your meetings, ask a member who has previously heard the speaker to give a testimonial. Personal testimony is the best recommendation.

A press-release notice should go to every genealogical columnist, genealogical and historical society, radio and television station, and newspaper (including the neighborhood shopping newspapers) within at least a 100-mile

radius. It should contain two short paragraphs that can be “lifted” easily for publication, and—above all—it should make your workshop sound like the interesting and important event that it will be. Be sure to include the society’s mailing address in the text. If a society member uses a computer bulletin board for genealogy, ask him or her to put out a notice. Mail notices to appropriate national publications. The FGS FORUM publishes a “Calendar of Events” for member societies in every issue. Realize, however, that all publications require notification far in advance of the event.

If you have planned your seminar or workshop well, it will be interesting, it will be fun, it will be educational—a day that area genealogists won’t want to miss. Convey that through your publicity, and they will come.



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Planning Successful Seminars and Workshops Part Two - Vendor Options and Accommodations by Patricia Law Hatcher, CG

VENDOR OPTIONS

Vendors contribute to successful seminars and workshops by providing an opportunity to learn about and purchase genealogical materials: books, forms, and novelties; preservation, presentation and photographic supplies and services; computer hardware, software, and training; book preparation, printing, and publishing; microfiche/film readers and rental.

Vendors, like speakers and facilities, often are committed far in advance of an event. If you plan to have vendor displays at your workshop, as soon as you have finalized the date send "Mark your calendar now" postcards to vendors who have participated in the past.

Like your publicity mailing lists, vendor lists and letters are best maintained from year to year by one volunteer. In this way, the mailing list can be enlarged, and a clear, informative letter and response form developed. Letters should be mailed to as many vendors as possible, outlining the types of participation:

Flyers or brochures. Many societies prepare "goodie bags" for each participant that contain advertising flyers. In localities where there

are not many workshop opportunities, these gifts are enthusiastically received. In areas with many workshops, ecologically conscious societies suggest that vendors send brochures for only a portion of those expected to attend, perhaps one-half. The brochures are placed on a "freebie table" where attendees choose those items of interest to them.

Door prizes. Vendors should be given adequate recognition for their donations. Try displaying the door prizes (with appropriate labels) on a table during the morning sessions. Presentation should be efficient and not rob time from the program. When the prizes are awarded, read the vendor's name, describe the prize, announce the winner. Have volunteers distribute the prizes to the winners (rather than the winners come forward); this can be a great time saver.

Syllabus ad. If the handout materials are in bound format, you may wish to include display ads. Be specific about the acceptable sizes and the form of the ad. It must be in final size with clear printing on white paper; photographs should be screened. Send a style sheet and rate schedule with the initial vendor letter.

Display or sales table. Make the vendor's letters informative and specific. Try to answer, in advance, any questions they might have. What is the cost of the table? It could be a door prize of a certain value, a flat price, or free. Are the number of tables limited? What is the exact size? Does it come with a cover or a drape? How many chairs are provided? Can signs be hung on the walls? Are electrical outlets available?

Scheduling is important to vendors who must drive several hours to your location. When will the doors open for vendor set-up? Ample time should be allowed before attendees are admitted. When are browsing times scheduled? When must the facility be vacated? Can the vendors attend the lectures? If so, must they pay the registration fee? Will the vendor area be open during the lectures? Provide maps to your location, along with a diagram detailing where vendors may unload and park, and the route to the display area. There should be a ramp or elevator, not stairs, and the distance should not be excessive. Include a contract/response form.

Once vendor letters have been mailed and responses received, get ready for the big day. Give ads to the syllabus chairman immediately. Neatly stack brochures for the freebie table in boxes, ready to be set out. If you prepare goodie bags, draft several volunteers for a "stuffing party." Invite new members. Organize the items including syllabus, handouts, and registration materials around a large dining room table and the work will go quickly. One secret of successful workshops is to use as many different volunteers as possible, asking each to donate just a few hours, and make those hours a fun experience.

Prepare a floor plan marked with doors, tables (for registration, freebies, door prizes, and vendors), chairs, electrical outlets, and each vendor's location. Tables should have sufficient space in front of them to allow browsing without causing traffic jams. Prepare signs with each vendor's name. If the exhibit area is not obvious, prepare "vendors this way" signs.

Prior to the workshop day, assign volunteers to

check the table set-up, to see that doors to the unloading area are open and the route clearly marked, and to help as needed. Each vendor's table should have a daily schedule. Sufficient time for attendees to visit all vendors should be arranged. Time before the first session makes registration easier and gives early birds plenty of time for shopping.

Whether in person, or by door prizes, brochures, and ads, vendors are important participants in any successful workshop. Vendor tables attract genealogists to your workshop, where browsing can be a favorite activity of the day.

ACCOMMODATING SPEAKERS

Watchwords for the relationship between the society and the speaker are **communication** and **courtesy**. The speaker is both a professional and a guest of the society, and should be treated accordingly. On the workshop day, you want a happy speaker—one who is comfortable, rested, and knows that you have planned well.

When the date is set, send confirmation to the speaker. Request a brief description of each topic under consideration and the level of each (basic, intermediate, advanced). Continue to communicate as you complete arrangements for transportation, accommodations, meals and the workshop schedule. Details on which both the society and speaker should be clear include:

The fee. How much and when to be paid? Will the speaker have books or other material to sell? Who will do the selling? Will the society receive a commission?

Audio-visual equipment. Will the speaker be using slides or overheads? Is a chalk or marker board required? Appoint a society member to operate and adjust the equipment and lighting. Check to see that there are extension cords, markers, erasers, and pointers available.

Handouts. How many pages are there? Who will reproduce them? If it will be the society, by what date are the originals required? If the speaker

provided them by what date is the attendance count needed? Distributing handouts during a lecture is disruptive; do this at registration or prior to each session.

Travel. Who will make the arrangements—will the society purchase the ticket or reimburse the speaker? When does the speaker prefer to travel? Is a particular airline preferred? If the speaker is driving, will reimbursement be based on actual mileage or an agreed-upon sum?

Local transportation. If flying, the speaker should be greeted at the airport and escorted to the hotel by a society member (and vice versa at the end of the visit). If the speaker is driving, provide detailed directions to the workshop location and/or hotel where all accommodations should be arranged by the society. Provide a written schedule of transportation to and from the workshop, all meals, and any special events. Ask if there are any local sights or research facilities that the speaker would like to visit, and provide a society host or hostess.

Lodging. Although some speakers are willing to stay in a member's home, most prefer a hotel or motel (not necessarily elegant, but clean, quiet, comfortable, with food service). Ask if a non-smoking or a smoking room is preferred.

Meals and entertainment. The society is responsible for all meals while the speaker is in town. Do not forget lunch during the workshop. Check on dietary restrictions. Some societies enjoy hosting a reception or dinner for the speaker. Check with the speaker first. Many want to use the evening before to prepare for the upcoming presentation and will be more relaxed at a post-workshop celebration. Others may need to return home immediately after the workshop.

At the workshop, the introducer should review the speaker's resume and chat a few minutes with the speaker. Do not read the resume verbatim. Select a few significant points and add one or two pertinent personal items. For example, that next week marks the speaker's fifteenth anniversary at the historical

society, or that by using the records about to be described the speaker found a horse thief—in the spouse's ancestry.

The audio-visual coordinator needs to check everything thoroughly before the opening session. Ice water should be placed on the lectern.

A break should be, literally a break for the speaker, not an opportunity for the audience to get personal answers to research questions. Allow the speaker to leave the room a few minutes before the audience. If the speaker is a smoker, locate the smoking areas in the building. Show the speaker where the restrooms are.

Ask how the speaker prefers to handle questions and announce this at the opening session. One good way is to distribute 3x5 file cards at the opening session, requesting that audience members print questions and include their names. The speaker may prefer to answer questions after each session or at the end of the day.

A week to ten days after the workshop, forward any evaluations collected at the event that pertain to the speaker or topics. This is also the time to send a brief letter indicating the society's appreciation of the presentation.

ACCOMMODATING ATTENDEES

To achieve your workshop goals, you must focus on one thing—making “satisfied customers” of those who attend. Everyone should feel they are getting value for their registration fee—and that they will want to return next year and bring a friend. An event that is profitable this year, but fails to satisfy, will cause next year's event to suffer. Remember the maxim: a happy customer tells one, but an unhappy customer tells ten!

The facility should be comfortable and convenient. The vendor area should be uncrowded, with ample time for browsing. The speaker should be both knowledgeable and interesting. The audience should be able to see any visual aids and hear the speaker easily.

Provide plenty of signs. Check with building staff

about any restrictions as to how signs may be mounted. Point the way to parking areas and the main door with large visible signs. If the building has several entrances, you may need signs on other doors pointing to the registration area. At registration, place the signs designating the lines for preregistration and walk-ins above the table, not on the front. Point the way to the vendor displays, restrooms, smoking areas, vending machines, eating areas, elevators, stairs, classrooms, and lecture halls—anywhere those participating may want to go.

You will need lots of volunteers—not a few people doing everything, but many people each contributing a little to a successful event. It is important to involve as many members as possible so they feel that they are a part of the success. Volunteers are enthusiastic, and their enthusiasm is contagious. Remember to have all volunteers stand to receive a big “Thank You!”

As soon as the building is unlocked, station a volunteer at the main door(s) to greet everyone with a cheerful “Good morning! Registration is to your left,” and to hold the door when needed.

At registration, have at least one volunteer for each one hundred people expected, twice that if you expect many walk-ins or if the registration period is short. In the hallways, have volunteers to point the way for those who are new to the building or who have gotten themselves turned around. The more maze-like the facility, the more volunteers you will need. All volunteers should wear a brightly colored ribbon, button, or name tag saying “Volunteer” or “Ask Me!”

To ensure the comfort of those attending, arrange for about twenty percent more chairs in the lecture room(s) than will be needed. It is difficult to get everyone seated in a room that is filled to capacity. It is also uncomfortable and stuffy. This is less of a problem in auditoriums with built-in seating.

Temperature is a frequent complaint. You will never please everyone, but if most people are too hot or too cold, an adjustment should be made. Tell the facility staff how many you are expecting so they can set the temperature accordingly. Remember that rooms will seem colder in the morning, but will heat rapidly when filled with people. If no building maintenance person will be on hand, a volunteer should meet earlier with that person to learn how to make adjustments.

The plans for the meals should be stated in the publicity and explained again during the morning announcements. Provide an eating area if lunch is “brown bag.” If lunch is not provided, include a list and a map of nearby eating places in the registration packet. Morning refreshments are a good idea and help keep audience attention from lagging during the pre-lunch lecture.

Genealogists love to talk genealogy. The opportunity to do so is one of the highlights of the day. Name tags for surnames are often used. Be creative; if the subject of the day is a state, provide a tag with the county lines drawn and let each person color the counties of interest. This helps strangers become a part of a group easily. At lunch, label each table with a different geographical area or state and encourage people to sit at their favorite research place to share experiences and questions.

Something will go wrong. Don’t panic. Have at least one volunteer who is available to “go fer” whatever is needed or complete whatever assignment arises. Genealogists are quite understanding if something goes wrong. However, planning carefully will avoid foreseeable problems.

How will you know you have achieved a successful event? When everyone says, “This was great! When is the next one?”