

Conferences That Make a Difference

Practical advice to help conference organizers deliver events that lead to learning and performance improvement



CONFERENCE STRATEGY



GET READY



CONFERENCE DAY



AFTER THE CONFERENCE

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About this eBook

We organize conferences. We spend considerable time trying to figure out how to make these conferences powerful learning experiences that make a difference. We wrote this eBook with the goal of sharing practical advice to help conference organizers plan and deliver events that provide valuable learning and performance improvement opportunities to participants.

Membership organizations, association staff, and other conference organizers interested in expanding the learning aspects of conferences will find value in the broad ideas, real-life examples, and tools, templates, and guidance we offer. We continue to learn as we put these ideas into practice, and we look forward to the conversation this guide inspires.

About Us

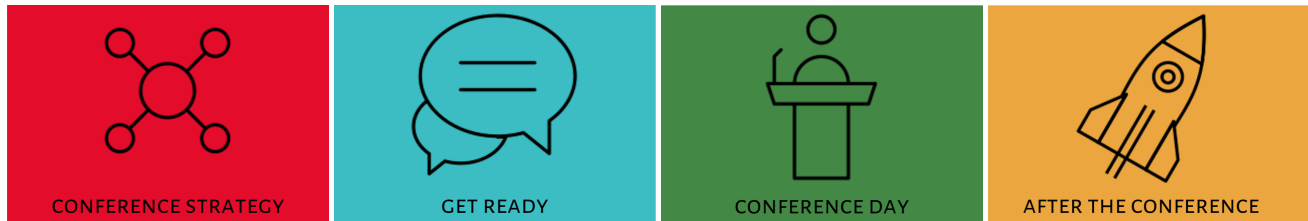
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
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Chapter 1: Conference Strategy and Overall Learning Approach

It's Monday morning—a fresh start to a new week. You open your email to a message from your favorite professional association. They just opened registration for their Annual Conference. This could be the opportunity you've been waiting for—a chance to learn from experts and share with peers in your community, a chance to make new important new connections, and a chance to exchange ideas with people facing familiar challenges. But your initial excitement is quickly countered by the reality of your budget, pressing priorities, and the understanding that your high expectations might lead to disappointment if your participation in the conference doesn't lead to change and improvement at work. As you consider attending this conference, the question lingers in your head: **Will my investment of time and money in this conference pay off?**

It's the same Monday morning, but now you're on the other side of that email. You've already put hundreds of hours into the initial planning for your organization's next Annual Conference. Registration is now open, and word about the conference is spreading throughout the community. But will you be able to deliver on expectations? Will the conference program deliver timely, relevant content? Will presentations be engaging and practical? **Will participants come to the conference primed for action and leave with tangible ways to put new knowledge, skills, concepts, and tools to use at work?**

This is the first of four chapters to help you deepen your thinking and practices related to conferences, particularly those run on a tight budget. In this chapter we introduce three topics:

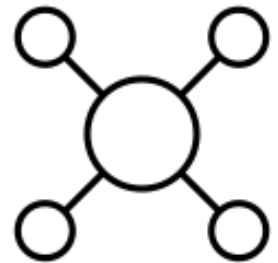
1. The **DEFINITION** of “conference”
2. Conference **STRATEGY** and **GOAL-SETTING**
3. **ADULT LEARNING PRINCIPLES** that relate to conferences

We hope this information will spark new ideas or reinforce existing practices that allow you to plan and deliver events that provide valuable learning and performance improvement opportunities to participants (and have some fun along the way, too!).



1. “Conference” Defined

First, let's define what we mean when we talk about a “conference.” While writing this book, we had in mind large events with diverse audiences and multiple learning opportunities, generally held under one roof.



Why are you convening people? What are you setting out to achieve with your conference?



By contrast, we’re not talking about discrete learning events or social gatherings designed for networking and celebration. We will not focus on event planning and the production elements required to manage a big affair. So you’re on your own when it comes to deciding whether to have eco-friendly swag and music in the hallways. **We focus on conferences that intend to convene professionals for purposeful learning and sharing opportunities.**

As such, a typical conference will include structured learning sessions along with networking opportunities and space for exhibitors and vendors to interact with participants. Oftentimes we think about these as separate and distinct elements of a conference, but they all have the potential to play an important role toward driving results for participants back at work. However, to speak to perhaps the most impactful element of conference delivery, **our focus will be the learning conveyed during main stage and workshop sessions.**

A typical conference will include structured learning sessions along with networking opportunities and space for exhibitors and vendors to interact with participants.

Subsequent chapters will explore the development and delivery of sessions, but here we will discuss conference strategy and adult learning principles that can be applied for effective conferences.

And although this eBook is written with conference planning and execution in mind, many of the same concepts and principles discussed in these four chapters convey to the planning and execution of other types of events that convene professionals to learn, share, and network.

2. Conference Strategy

Decision-making regarding your conference will be much easier if you develop and adhere to a conference strategy. Your conference strategy should be part of an overall learning strategy for your organization. Your organization’s learning strategy might operationalize a larger sector-level performance goal. We find the alignment of strategy—from organizational to conference-level goal setting—to be an important but often missed opportunity.

Here’s an example from a nonprofit state association. It shows how a goal for a conference can align with the learning strategy and the organizational goals:

Conferences are powerful ways to drive learning for your participants. They become even more powerful when complemented by and aligned to your organization’s other learning activities. Remember, your conference is just one event in a larger constellation of learning events.



GOAL SETTING

Typically, an organizational learning strategy will include goals around **reach** (e.g. the number of participants you want to reach through learning events), **results** (e.g., the impact that your learning events will have on individuals and organizations), and **revenue** (e.g., the financial contributions that learning events will bring to the organization).

These three types of goals—reach, results, and revenue—are best served when they are in balance. Short-term imbalance to achieve a specific purpose can usually be tolerated, but too much emphasis on one type of goal over the others can lead to problematic outcomes until balance is restored.

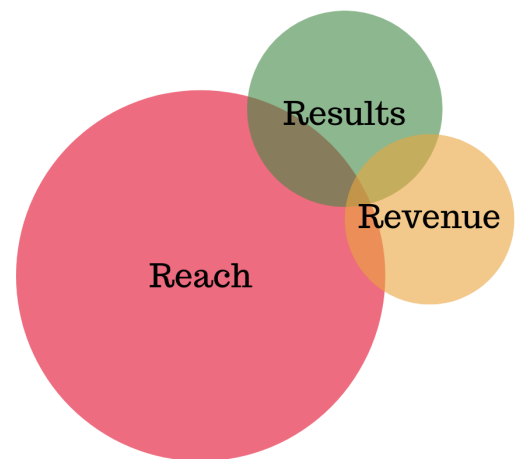
An example of the consequences of imbalance helps to illustrate this point. An organization with which we're familiar decided a few years ago that its annual conference would include a virtual live streaming option to increase reach. It was decided that reaching more people in the short-term was more important than recovering the costs of the live streaming with a balanced revenue goal. Many people did join for free—as chosen through a lottery system—and the reach goal was achieved. It was difficult, however, for the organization to justify offering live streaming again because the costs far outweighed the revenue. As a result, the live streaming option was dropped in the following year. Similarly, it's easy to imagine how prioritizing revenue or reach over results would not be sustainable because participants would fail to benefit from their investment of time and resources.

Clearly articulating conference goals that balance reach, revenue, and results will also support broader decision making for the conference. When and where you conduct your conference should be informed by your strategy, as should the conference program.

As mentioned above, your conference strategy should reference and contribute to the overall learning strategy, which could also include free and fee-based workshops, webinars, online communities of practice, white papers, and other learning-based products and services. Likewise, those non-conference learning activities can help inform the themes and topics you can highlight during your conference sessions.

The main point is that the conference is usually one part of a comprehensive learning offering. And while you can support effective learning at a conference, your conference need not bear the burden of all your learning goals. In fact, it should be a natural part of the continuum of learning, benefitting from your organization's broader learning portfolio. The decisions you make related to the conference—timing, location, focus—can further the goals in your organization's strategic plan.

Imbalance is unsustainable



3. Adult Learning Principles

Assuming your conference contributes to an overall learning strategy, let's focus on maximizing the likelihood that participants leave your conference ready to take action on something because of the effective learning opportunities you provided at the conference. We believe strongly that as important as it is to learn, learning for the sake of learning doesn't move your people forward. Participants also need support in the application of new learning to achieve results. "Learn, Apply, Achieve" has become a mantra to signal the need to go beyond learning.

"Learn, Apply, and Achieve" has become a mantra to signal the need to go beyond learning.

First, we'll present four useful concepts with both technical and non-technical language and then provide some ideas to apply the concepts.

Four adult learning concepts:



Reduce the cognitive load

Keep it simple



Facilitate structured reflection

Give them time to make it



Flatten the forgetting curve

Support remembering



Support learning transfer

Help them take it back to work

These principles represent important elements of the *learning process*, recognizing that learning requires more than exposure to new information. Together, they help participants learn during and after the conference, apply new knowledge and skills back at work, and achieve results.

REDUCE COGNITIVE OVERLOAD (Keep it simple)

Conference sessions are usually around an hour in length. It is up to you to guide presenters to make the most of that time by focusing on one or two main learning points rather than trying to convey a career's worth of knowledge and expertise. A goal might be for conference participants to leave each session having learned one important new concept or idea and compelled to learn more if the topic is relevant to their work. **Here's a good test: Can your presenters summarize their presentation in one tweet?**

A talented presenter can discuss complex topics by building on base knowledge that participants bring to the session or by using stories or metaphors to make complex topics relatable. Adult learners appreciate and benefit from this 'scaffolding' approach of building on familiar concepts.

Because most presenters will accompany their talking points with multimedia visuals (e.g., PowerPoint presentations), we highly suggest using Richard Mayer's work to reduce what he calls the "extraneous cognitive load" and allow participants to focus their energy on learning. His work deserves more

attention than can be presented here, but he strongly suggests that visuals such as PowerPoint slides be free of clutter (“illustrate, don’t decorate”), highlight important details, use strong visuals rather than words, and discuss only one concept at a time. Oliver Caviglioli’s dual coding work also speaks to the benefits that result when speakers are intentional when reinforcing words with images.

Presenters’ PowerPoints should be like back-up singers—enhancing the message of the ‘lead singer’ or presenter, not replacing or distracting from it. The chapter summary includes a link to a talk by Richard Mayer highlighting the principles his research has found to reduce cognitive load.

Beyond the session delivery, cognitive load can also be managed when participants are aligned to the topic even before they enter the room. Good session descriptions, as discussed in Chapter 3, go a long way in reducing cognitive load and frustration too.

FACILITATE STRUCTURED REFLECTION (Give them time to make it their own)

Presenters are in the front of the room delivering the sessions, but they are *not* the most important people in the room.

So, who are the most important people in the room? **The participants.**

Effective presenters consider ways to help participants absorb session content and determine how to adapt the concepts for their benefit. Conference planners can support this in several ways, both during structured sessions and outside of the formal session structure.

During sessions, presenters can encourage participants to either think about or discuss with a neighbor how concepts can be applied in their work to achieve results and meet goals. Presenters can also create more elaborate activities that help participants consider the concepts discussed and practice using them as they would in their workplace. More elaborate activities might also allow participants to relate the learning points to specific results and goals. As a conference planner, you can provide presenters with guidance and support through webinars, phone calls, tools, and templates before the conference. We continue the discussion on speaker preparation in Chapter 2.

Outside of structured sessions, conference planners can encourage and provide time for participants to think or discuss with a colleague what they’ve learned, why it’s important, what questions they have, and what actions they can take back with them to achieve results. This can be supported through networking breaks, handouts for participants to complete, and less formal wrap-up sessions at the end of the event. *See Resource section for tools you can adapt for your presenters.*

FLATTEN THE FORGETTING CURVE (Support remembering)

Remembering is key to the learning process. If participants can’t remember what they heard (or “learned”), it will be nearly impossible for them to apply it in the workplace. Humans forget. And we forget for good reasons—it’s not a flaw. But there are effective ways to support remembering!

During sessions, presenters can support remembering by gaining and maintaining the attention of participants, engaging their emotions, and reinforcing concepts with repetition or practice. In short, participants pay attention to, understand, and remember concepts and information that is placed in a familiar context—building on what they already know—and that is emotionally important, including information, skills, and tools that are relevant to their success at work.

Practically speaking, attention, emotion, and reinforcement to support remembering can be achieved through storytelling, memorable metaphors or analogies, workplace cues, and restating important messages and ideas in different ways.

You can also build an infrastructure to support remembering from start to end of your conference by reinforcing key concepts and asking participants to restate significant learning points in their words. You can provide tools to support remembering, build a culture that celebrates implementation of new ideas, and have an impact on whether and how participants put new knowledge and skills into practice back at work. These are ways to support remembering during the conference; the final chapter discusses ways to support remembering *after* the event. But thinking about what happens after the conference leads to the final point for this chapter.

SUPPORT LEARNING TRANSFER (Help them take it back to work)

Although we've been focusing on effective adult learning, we support learning opportunities not simply to enlighten participants with knowledge. We want people to get just enough **knowledge** to move them forward in a challenge or opportunity, **skills** to then apply that knowledge to a real situation, and **tools** (templates, checklists, sample documents, etc.) to move them quickly to action.

Learning transfer is about building the bridge between the conference session and two weeks later when the participant is trying to implement new knowledge and skills at work. This is the culmination of the previous three concepts. Participants need time to reflect on the learning points and consider how to apply it at work to achieve important objectives. And participants need to remember enough to be able to take the first steps to use it.

Subsequent chapters will build on the concepts introduced here, supporting you through the pre-conference process, the 'big day' when your plans, presenters, and participants all come together, and steps you can take to continue supporting participants after they've returned to work.

So, back to that email on Monday morning. Let's make sure you can deliver on your participants' expectations for an outstanding day of learning and connection. Ready? Let's go!

Power of story

Storytelling can be especially powerful because it often touches us emotionally and creates mental models that we can recall more easily than a list of facts. The most powerful stories stir up emotion—including happiness and sadness, excitement and fear—and allow the listener to connect a coherent series of events together. However, storytelling must be authentic and clearly connected to the learning point. Otherwise, participants will not be engaged or might even be confused or distracted from the learning point.

Chapter 1 Summary

KNOW

CONFERENCES are opportunities to bring professionals together to learn, share, and network.

Conference planning should be grounded in a **CONFERENCE STRATEGY**, which should be developed in support of the organization's overall learning strategy.

Conferences are most effective when they provide meaningful **LEARNING** opportunities that can lead to action and results when participants return to work. For example:

- Don't overload participants with too much content, facilitate structured reflection, and support remembering.
- Focus on what the *participant* will do during the session and should be able to do when back at work.
- Consider how the participant can build on, adapt, or apply knowledge from the session into the workplace. As discussed in Chapter 2, knowing your audience is an important step in this direction.

SHOW

If you were to implement these ideas at your conference, we would hopefully see:

- A conference planning document that includes a strategic focus for the conference based on organizational strategy.
- Session planning guidance that encourages presenters to support learning, reflection, and remembering.
- Conference participants who are not only learning during sessions but considering how to use that new knowledge in the workplace.

HELPFUL LINKS

- Tagoras article on the balance of Reach, Revenue, and Impact: <https://www.leadinglearning.com/reach-revenue-impact>
- Endurance Learning principles of intentionality: <https://trainlikeachampion.blog/i-dont-do-touchy-feely/>
- Learning and Forgetting Curves - Short video by Dr. Will Thalheimer: <https://www.youtube.com/watch?v=lltgAV6Ly6M>
- Designing Multimedia Instruction to Maximize Learning - Dr. Richard E. Mayer Lecture: <https://www.youtube.com/watch?v=p5i3f9E53Og>. This video is quite technical but uses good examples throughout.
- An Introduction to Dual Coding Theory – Short video by Oliver Caviglioli: <https://www.futurelearn.com/courses/technology-teaching-learning/0/steps/53322>

See the **RESOURCE** section of this eBook for samples and templates related to this chapter.

Chapter 2: Get Ready— Pre-Conference Activities

Conferences take a lot of preparation. People need name tags, food (coffee!), and a program that tells them where to go. The learning elements of a conference also take preparation. Your attendees need your support to get them ready to turn powerful learning into action and behavior change. Your presenters need the chance to hone their presentations.

We offer four ideas to help you get ready for your conference:

1. Incentivize **TEAMS** to support peer learning and accountability
2. Gather information through the **REGISTRATION** process
3. Start the learning through **PRIMING** activities
4. Prepare **PRESENTERS** to be excellent and action-focused



1. Power of Teams

Anyone who has ever tried to achieve a goal knows that it is harder to duck out when someone is holding you accountable. It is easier to make something happen if the key collaborators on the project are involved from the beginning. In terms of learning, teams of colleagues attending the conference provide both the carrot and the stick of influence and accountability. (Group registration also helps your revenue goals!)

There are several ways to incentivize and support teams leading up to a conference.

ACTIONS

- Market for teams.**

Sometimes people need to be prompted to consider new ideas and approaches. If an Executive Director typically attends her sector conference alone, it may not occur to her that she can bring the Development Director and Board Chair. By prompting her to think about her biggest challenge or opportunity and who would be involved in addressing it, she can better see the return on investment. Of course, it helps if you offer a discounted price for group registration!



Sharing the work

We recognize that these suggestions represent more work for you, so let's discuss how to expand your planning team. Conference planning often becomes the burden of a small team with other responsibilities. Yet you probably have enthusiastic supporters and champions from outside the organization—like board members, active members or young professionals—who are happy to contribute time, energy, and talent to conference planning activities. Volunteer steering committees, for example, can help shape the conference program, make connections to potential exhibitors and sponsors, and encourage peers and colleagues to register for the conference in which they are now invested. These contributions can ultimately lead to improved revenue, reach, and results by bringing insights and connections grounded in the reality of the work.

□ **Support teams.**

Teams are powerful if they have time to connect and reflect. Build in time during the conference for conversation. It could be at lunch, which hopefully isn't so tightly scheduled that people can't recover from their busy morning. Block at least 30 minutes of unprogrammed time when individuals can network and teams can come together and share ideas. Encourage teams to use the Conference Planner to organize who is going where and why. *See Resources for a sample.*

□ **Build teams.**

You don't have to arrive at the conference in a team to benefit from the power of one! There are various ways to build teams.

Talk about the power of teams from the podium. Challenge people to find 3 people they didn't know coming into the conference to follow on social media or connect with after the conference.

Share who is coming to the conference so people can anticipate connections. This is easy to do if you are using a conference app. Other conferences publish a "Who's coming" list on the conference website.

Use nametags, ribbons, or other identifiers to help people find each other. This can be done at the conference through stickers or markers at the registration desk. Identifying information like where participants come from could come from the registration process.

"Find your people" programming. A pre-conference conference "deep dive" track or a Day One conference round table session can help people find others like them.

Expand the definition of team

As a conference planner, you can take steps to encourage participation by organizations or individuals that might not be inclined to attend without an additional nudge or incentive. For example, your conference strategy might benefit from participation by grassroots organizations that will need strong justification to spend time and resources away from their work. (These types of participants might also need financial support, through a scholarship; consider this at the goal setting and budgeting stage.) By being pro-active in how you invite people into your conference community, you are expanding the potential for diverse teams at the conference.

2. Registration

When you register for something, you are saying yes to an opportunity. You know that you will have to share some information about yourself. You are probably fine sharing a bit more about yourself if it helps make that event even better for you and others.

As a conference planner, you can use the registration process to better understand who is attending and what they most need out of the conference. Delivering a good learning experience starts with a deep understanding of your target audience, including their prior knowledge and biggest challenges. The best way to know this information is to ask!

ACTION

□ **Ask for the data you and your presenters need.** There are two kinds of data to consider:

Demographic information. You are probably already collecting name of organization, position, and location. What other information do you need? To answer this question, return to the conference goals you have already articulated. Who do you want to reach and how will you know that you have? If you have a goal of diversifying attendance, you might ask about race/ethnicity, gender, or disability. If you have a goal of reaching a diverse size of organizations, you might ask about budget size of organization. If you are interested in tenure of attendees, you might ask about number of years in service or position in the organization. Remember that this is an iterative process that may lead you back to your marketing and recruitment strategies to expand the likelihood that you reach your goals.

Performance-related topic suggestions. Many conferences now feature some sort of “open space” or “unconference” session where there is no speaker but rather an opportunity for peer sharing. (We’ll talk more about these in Chapter 3.) These elements benefit from some information in advance. It is typical to ask questions like: “What keeps you up at night?” “What big challenge or opportunity do you hope to find answers for at the conference?” or “Given this list of topics [provide list], what do you find most interesting?” Gathering this information can inform the programming around teams described earlier.

3. Priming

Just like a house needs to be primed to hold the paint, our brains need priming to get ready to hold the information we are about to receive. A powerful learning experience begins long before the keynote speech or the workshop sessions. You can get your attendees ready for the conference experience generally and your conference specifically by doing a few things.

ACTIONS

Create a Conference Planner.

Help attendees get a jump-start on learning by giving them a simple workbook to organize their thoughts. You can invite them to think about a problem that they hope to solve, choose sessions to attend, and list the kinds of people they hope to meet. By giving them clear information about what is happening and specific guidance about how to prepare, you help reduce the stress that might come for some when they walk into a ballroom full of people they don’t know.

Encourage goal setting.

Brian Washburn of Endurance Learning encourages people to set three kinds of goals, which he calls Minimum, Primary, and Visionary (MPV). Think about **people** goals (who to meet/connect with), **performance** goals (solve a problem, finish a project), and **bonus** goals (something that would be the icing on the cake, like getting a new idea for a project or seeing something really cool).

Use video to get attendees ready for specific sessions or the conference as a whole.

Give voice to the Conference Planner with a short video introducing the logistics and content of the conference. Invite presenters to share short videos—or use existing talks—to engage attendees in some of the ideas that will be shared at the conference. See “Helpful Links” in the Chapter Summary for an example from Mark Nilles.

4. Speaker Preparation

We assume our presenters have a certain level of presenting skill. We choose them because of prior experience or a stellar reputation. They clearly know their stuff, so they must be able to pass that wisdom on. In reality, not all presenters are as skilled as we might think, and even those with many conferences under their belts can appreciate a chance to learn how to help people learn.

ACTIONS

□ Gauge how much support a presenter might need.

If your presenters have years of workshop presenting under their belt—or are experienced adult educators—you may not need to invest a lot of time in getting them ready. Look for presenting experience and references you might be able to gather from people who have seen them in action.

No matter how much experience a presenter has, though, she will benefit from basic information about the expected audience, the conference themes and goals, the room set-up, and other factors that may affect the presentation. For example, knowing there will be a wide range of expertise among participants can help experienced presenters prepare a session that is suitable for all levels of learners. Bottom line, we feel that *all* presenters benefit from some support as they prepare their sessions—whether they need full assistance conceptualizing a session plan or simply need basic information about who to expect in the room.

□ Provide resources on how to present effectively.

Give presenters a Session Planning Guide to provide a structure around learning outcomes, appropriate levels of content, and engagement activities. *See Resources for a sample.*

Three Presentation Structures



Endurance Learning frames presentations around a simple model with four elements.

Anchor: Get the attention of the people in the room.

Content: Cover one or more perspectives on the topic using knowledgeable sources.

Application: Give participants time to explore application of concepts, tools, or skills.

Future use: Compel participants to commit to action.



Humentum teaches a similar framework. They like to say that the CPR approach brings life to a presentation.

Content: Share information on the topic with participants.

Practice: Let participants practice the concept, tools, or skills being discussed.

Review: Reinforce (or correct) practice through a review process led by the facilitator.



Washington Nonprofits uses Guila Muir's "kite method." (*Instructional Design That Soars*)

The frame: Purpose and outcomes

The sail: Context and body

The tail: Active closure

See the “Helpful Links” in the Chapter Summary for short videos and other resources by Mark Nilles designed to get presenters ready.

Schedule one-on-one conversations with each presenter.

In the past at one organization, we would only speak with presenters with whom we had concerns. Now we schedule conversations with every presenter, and the discussions are often rich with ideas. Presenters often think in new ways about how to deliver their session. If a panel is involved in the session, we talk through the best ways to make this format a high-quality learning experience. *See “Helpful Links” in this Chapter Summary for resources on panels.*

Conduct a group orientation for all presenters.

Workshop presenters are critical to the success of a conference. They lead the sessions where people roll up their sleeves and practice something of shared interest. They shape a community of practice that will move your sector forward. Invest time to ensure they connect with each other and the theme of the conference, understand the flow of the day, and have a chance to ask questions. Think about the conference’s values and how you will bring others on board. A recent conference in Seattle, for example, encouraged all presenters to participate in a pre-conference session on race and equity to draw attention to how they could better honor the diversity in the room. These orientations can be held in-person or online (e.g., webinars).

Chapter 2 Summary

KNOW

1. Attendees will be much more likely to take action on their ideas if they are a part of a **TEAM**. That team can be made up of people both within and outside their organizations. Through your marketing, registration, priming, and learning activities, you can expand who participates and incentivize teams.
2. The **REGISTRATION** process is an important part of your conference because it is when someone is saying “Yes” to coming. They are already providing their contact information. It is a great time to get additional information to help you understand whether you are achieving your goals and to plan an even better learning event.
3. Get participants ready to learn through **PRIMING** activities. You can engage their emotions by making them more curious or giving them ways to diminish their stress. You can give them a jumpstart on learning the content or an invitation to spend time reflecting on how the content relates to their work.
4. Even the most experienced **PRESENTERS** need an opportunity to reflect on their teaching and customize their presentations to your audience. They need a chance to understand the context in which their session appears. They need opportunities to reflect on the values that you hope they deliver on in their sessions.

SHOW

If you were to implement these ideas at your conference, we would hopefully see:

- A diversity of participants that extends well beyond the group that usually shows up.
- Teams from one workplace attending the conference.
- Intentional networking during and in between sessions.
- Marketing language and session opportunities that speak to what people said they wanted to learn at registration.
- Strategic “priming” opportunities for attendees to reflect, connect, and learn prior to the conference.
- Presenters who can describe the context and culture of the conference.
- Presenters who get high marks for delivering sessions that move people to action, in part because of the support you have provided.

HELPFUL LINKS

Some key tools to explore:

- Sample session marketing video made with Powtoon: <https://www.youtube.com/watch?v=Y2Ehd2DMsCE>
- “Powerful Panels with Kristin Arnold,” Leading Learning podcast: <https://www.leadinglearning.com/episode-75-powerful-panels-kristin-arnold/>
- How to develop an engaging session (video by Mark Nilles): <https://www.youtube.com/watch?v=6hNXwrOgxyz>
- How to design different types of sessions (video by Mark Nilles): <https://www.youtube.com/watch?v=nZyIjLfA0bY>
- Tamsen Webster videos to prepare speakers for Content Marketing World 2018: <https://www.youtube.com/watch?v=C0SSksTy0U&feature=youtu.be&list=PLQEqAH2tW9cFKrqAk6-64f-3VDhuMwaTn>

See the **RESOURCE** section of this eBook for samples and templates related to this chapter.

Chapter 3: The Big Day – Deliver an Event That Makes a Difference

Ready, set, go! You’ve done everything you can do to get your conference attendees ready for a great day of learning. Now let’s spend some time on the big day(s) and ways to address the approaches to effective adult learning we discussed in Chapter 1: facilitating structured reflection, reducing overwhelm, flattening the forgetting curve, and supporting learning transfer.



Consider four ways to strengthen learning at your conference:

1. Include **PARTICIPANT-LED LEARNING** within your schedule of speaker-led programming.
2. Set aside time for individual and peer **REFLECTION** into the schedule.
3. Provide **PRINTED MATERIALS** that help participants organize their ideas.
4. Organize **LOGISTICS** in ways that increase opportunities and remove barriers.

By putting a few key pieces into place, you can strengthen what people learn

We considered adding a fifth way—intentional networking. Networking is a vital element of any conference. It is a chance for attendees to “find their people” and build connections that lead to greater confidence, shared resources, and a greater sense of being a part of a larger whole. **Rather than separating out networking, however, we made networking a through-line that ties these elements together.**



1. Participant-led learning

Most conferences are dominated by speaker-led learning. Between keynotes and workshops, we are being spoken to—some might say at—for most of the day. We come for new ideas and inspiration, and speakers can provide that well. It’s important for speakers to frame the challenges participants face and to facilitate useful peer conversation and feedback, but that can be difficult, so we offer a few practical ways to structure participant-led learning.

IDEAS

Table talks. Most people have a workplace challenge or opportunity on their mind. It may be something that keeps them up at night. It could be a curiosity they wish they had time to explore. Perhaps they need a resource or idea to overcome a barrier. In Chapter 2, we suggested that you collect this type of information during the registration process. Why not set aside time to invite conversation on these topics? Here is how that could work.

- Set aside an hour in the program for Table Talks. We suggest before lunch to increase participation.
- When you ask what they want to talk about during the registration process, also ask if they would be open to facilitating that conversation. The Table Talk Instructions included at the end of this chapter will show them that no prep is needed, only a willingness to keep the conversation moving.
- One week before you go to press on the printed program, sort the list by who is willing to facilitate a conversation.
- Review the rest of the topics for important ones that haven't been covered. Either broaden the topics that have facilitators or recruit new facilitators from your key allies or workshop speakers.
- Email all table talk facilitators to confirm the role and topic. (Be prepared for some people to back out of the facilitation role.)
- On the day of the conference, have table tents with table topics ready. A facilitator packet on the table provides the instructions (again), notepaper, and a roster to note participant names. (See the detailed instructions at the end of the chapter.)

Table talk sessions offer incredible networking opportunities. Here you have people who did not know each other at the top of the hour deep in conversation about a topic they have in common. Inevitably the session ends with card swapping and, when placed right before lunch, an exodus to the ballroom to find a table together.

As much as we try to provide a lot of discussions on high interest topics—like fundraising or new manager training—it can happen that one group forms too large for a good conversation. In this case, conference organizers should encourage large groups to break up into subgroups. In one case, a large group of 30 really didn't want to break up, and they took over the hallway outside of the workshop room. Whatever it takes for people to be a part of the conversation they want to experience!

Open space/ unconference. Your conference may be the space for a community of people to generate their own agenda. Let's think back to your organization's strategy: it may be important strategically to make space for generative conversations that involve participants in setting the agenda. For example, organizers of a recent national conference of people working to end hunger wanted people to come together by region to generate their biggest challenges and organize around possible solutions. Key to their strategy was local ownership of solutions that local people would carry out after the conference.

They scheduled the session on the first day of a three-day conference to help attendees "find their people" early on. A facilitator opened the session explaining why they were there. The results of the conversation informed the rest of the conference and provided a framework for post-conference collaboration. (Under "Helpful Links" in the chapter summary, we've provided an article on how to run an un-conference.)

It's ok to not participate

While checking on workshops at a recent conference, I noticed a woman sitting at the back of the room. I eagerly approached her to encourage her to join a table--that's where the action is going to happen. She seemed to curl into a ball as I spoke with her, and she stated very clearly that she would be more comfortable left alone.

As much as we value participation and engagement, we also need to honor the fact that some people prefer quiet concentration, individual work, and fewer stimulants. It may take a lot of energy for some people to get through a conference day. In her book, *Quiet: The Power of Introverts in a World That Can't Stop Talking*, Susan Cain invites us to consider how to create a welcoming space for introverts.

This is an excellent example of not only offering opportunities for participants to make meaningful contributions to conference content but also to align conference activities to conference goals that support strategic priorities, as discussed in Chapter 1.

“The Doctor Is In.” The fastest way to get people answers to their questions is to have experts available to answer them. A conference offers a lot of opportunities for one-on-one learning because you have so many experts in the form of speakers, exhibitors, and staff. It also offers the chance for some of these experts to have authentic, natural conversations about topics in ways that they can’t have at the front of a room. We have seen various ways to achieve this: Q&A lounge with suite of experts, a “Doctor Is In” zone where consultants wearing lab coats offer 15-minute consultations at bar tables, or a collection of questions and answers curated by a high-energy facilitator who proactively seeks answers from experts and exhibitors at the conference.

2. Reflection

The word “reflection” is used often, but let’s take a moment to define it within the learning process. It is deep, sustained, rigorous thought that has a purpose. Reflection is the oscillation between what you hear and what you know or are experiencing. It is the process in which we place ourselves into a larger context. We begin to see the system that influences the situation in which we find ourselves. Reflection is an important aspect of the learning process and helps us to take what we learn and transfer it back into our workplace.

ACTIONS THAT SUPPORT REFLECTION



Build REFLECTION TIME in to the conference schedule.

Be generous when scheduling passing time so that people aren’t jumping from one session to the next. Give people adequate time outside of sessions to gather their thoughts and talk about them with fellow participants. This is an important element in helping people network.



Create SPACE for reflection

Increasingly, conferences are setting aside space for individual or pair reflection. Is there a part of your conference center with comfortable chairs? Is there a room you aren’t using that you could make into a conference lounge? By making the space for reflection, you remind your participants that it is an important part of the day.



Coach PRESENTERS to build reflection activities into sessions.

We mentioned this already in Chapter 2, but it is worth repeating. Your presenters may need a few more tools in their toolbox to make space for reflection. Reflection during the session can be an individual exercise or done in pairs or small groups.

3. Printed Materials

At this point, your participants know your conference is different because they have seen how you invited input and prepared them for a great day of learning. Your program serves as your *piece de resistance*: it is the document that showcases the values creating this day. Participants will hold it in their hands and use it to make decisions. Let's talk about your program and some other tools to deepen learning.

□ CONFERENCE PLANNING GUIDE

A conference can be like a small city. Big stage events, small room events, exhibitors, displays, and so much more. It can be overwhelming to navigate, which is why a Conference Planning Guide can make a difference. A few days before the conference, send registrants a simple worksheet that outlines the main elements of the day. Encourage them to fill it out as they prepare to attend so they bring a higher level of intentionality and focus to the conference. *See Resources for a sample.*

□ PROGRAM

A typical program includes the key elements of the conference: schedule, keynote description, workshop descriptions, exhibitors, and other events and gatherings. It is designed to look snazzy. You proofread it for marketing-factor and accuracy. Beyond being a static information tool, the program can be dynamic resource with a shelf life long beyond the conference. **Here are some learning elements to consider in shaping your printed program:**

Clear and useful session descriptions. Bottom line, people read these descriptions to select sessions that meet their needs. Is it the right topic, right speaker, right level, and right method (i.e. hands on session vs. panel of speakers)? Tell them! Use session titles and descriptions that clearly explain what will be covered. List the learning outcomes so attendees will know what they will walk away with. Define the target audience: who is the session designed for. The clearer the descriptions, the more satisfied the attendees. And while this might seem obvious, it's important to either involve the session presenter while writing the description or get her approval before publishing it. Better that the session description be clear and accurate than well-written but imprecise!

Goal setting/ tracking page. Include a page that invites attendees to describe their goals for the conference. We introduced this idea in Chapter 2. These goals can be centered on solution finding, networking, or general inspiration. The more thought and planning participants have put into their goals, the more likely the sessions they attend and conversations they have will be useful during and after the conference.

Workshop reflection page. A page in the program on workshops can collect key take-aways and action steps. Let speakers know about this so that they refer people to it. Include questions like:

- What's one thing I learned?
- Why is it important?
- How can I use or adapt it?
- What other questions do I have?

This reflection page can include space for session-by-session reflection, daily reflection, or something in between. As acknowledged elsewhere, reflection doesn't need to be limited to an individual exercise. Group "working out loud" sessions—either during or after the conference—can provide participants opportunities to reflect on content, benefit from additional perspectives, and identify opportunities to collaborate. Group reflection can also take the form of sharing with peers and colleagues who weren't at the conference to further disseminate ideas and information.

ORGANIZERS

A powerful speaker invites attendees to consider new ideas. How can you help your conference attendees capture these ideas, their "aha" moments related to them, and actions that they plan to take? How can you reduce the distractions build a direct connection between the speaker and a note-taking tool everyone is using?

Consider a "placemat." This one-page document, preferably on legal-size paper, gives attendees a structured way to capture their ideas in a format designed by or in collaboration with the speaker. When the speaker gives time for peer sharing and reflection, she can refer to the placemat. (Coloring pencils were a big hit at one conference!) *See Resources for an example that brings this idea to life.*

4. Logistics

No matter the quality of the speakers and the presentations they've planned, the little things can undermine a great day. A slideshow doesn't get shown because the Apple computer didn't connect to the PC-compatible projector. A panel isn't able to be heard because the room doesn't have a microphone. People can't do an activity because there aren't enough copies of a much-needed worksheet. Double-check or do a test-run on any significant aspect of the learning experience, considering questions such as:

- Does the technology work? Has it been tested? Do you have a back-up plan for all presentations?
- Do you have a sound system either planned or ready to implement if more volume is needed? See "Tools" at the end of this chapter for a short video on why "liking the mic" is important to expand accessibility for hearing-impaired participants.
- Do you have a plan for participants to use a microphone? Have a plan to avoid that frustrating situation where people asked questions that no one can hear.
- Do you have—or will the speaker bring—handouts needed for the presentation? Do you have a plan to print more handouts if the session is more popular than expected?
- Do you have wayfinding signage in place so that people can find where they need to go?
- Do you have typical teaching supports if needed: flip charts, markers, tape, sticky notes?

Chapter 3 Summary

KNOW

1. Participants appreciate having the chance to talk with peers about topics of mutual concern. Giving them space to frame their challenge and then get ideas and answers from a wide cross-section of people will help them when they get back to the office. **PARTICIPANT-DIRECTED PROGRAMMING** also helps them to build their network!
2. A cornerstone to learning transfer—applying what you learn later—is **REFLECTION**. Reflection is the time and space needed to connect what you are hearing with what you know or are experiencing. Time to reflect should be built into the day’s schedule as well as individual sessions.
3. Your **PRINTED MATERIALS** are tools to engage conference attendees in ways that strengthen learning and connection. A conference planning guide helps to get them ready. A program can guide attendees to the right sessions and give space for notes and action ideas. A “placemat” can center attendees around key ideas.
4. Don’t let **LOGISTICS** get in the way of a great learning day. Key learning-related logistics include: technology, the sound system, copies, signage, and teaching supports.

SHOW

If you were to implement these ideas at your conference, we would hopefully see:

- Attendees arriving at the conference with a clear sense of what they hope to get out of the day.
- Attendees experiencing high conference satisfaction because they are finding what they need to solve a problem or take advantage of an opportunity.
- Unscheduled time during the conference. Time during workshop sessions where the presenter is not speaking.
- A suite of printed materials that support learning from before the conference begins to well after it is over.
- Smooth conferences sessions where people can see, hear, or have whatever they need to learn.

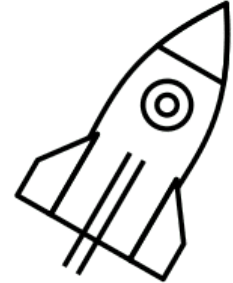
HELPFUL LINKS

- “How to Run an Un-Conference,” a practical guide on how to structure an un-conference:
<https://medium.com/responsive-org/how-to-run-an-un-conference-92e7cf089831>
- “Like the Mic” video on why microphones are important to building a hearing-friendly, inclusive event:
<https://www.rootedinrights.org/videos/accessibility/like-the-mic/>
- “So Who’s In the Room? Moving On.” Chunk Flip Guide Laugh blog on engaging conference audience:
<https://chunkflipguidelaugh.com/2018/09/19/so-whos-in-the-room-moving-on/>

See the **RESOURCE** section of this eBook for samples and templates related to this chapter.

Chapter 4: Make It Stick— Post-Conference Activities

The conference is over! Congratulations! By all accounts, it was successful: the sessions were full of happy participants, the logistics were seamless, new connections were created, and there is general enthusiasm and optimism among participants as the conference comes to a close. The conference was a rich learning experience, but in many ways the end of the conference is really the beginning of the journey. It's only after the conference that participants will be able to apply new knowledge, skills, tools, and practices in the workplace. And it's only after the conference that you can reflect on what went well, what could have gone better, and how to prepare for an even better conference next time!



Deadline-fueled adrenaline and the excitement of seeing your plans in action helped you deliver a successful conference. Without the pressure of delivering the big event, post-conference activities need well-planned and need to serve a clear, agreed-upon purpose. Otherwise they will be lost in post-event exhaustion, and you'll risk losing opportunities to learn about the conference and to continue supporting learning and learning transfer among participants.

What you do after the conference will determine whether you achieve your strategic goals

There are two main categories of post-conference activities for you to consider:

1. Activities that reinforce **PARTICIPANT LEARNING** and encourage **ACTION IN THE WORKPLACE**.
2. Activities that deepen **YOUR OWN LEARNING** about the conference experience.



1. Support participants by turning learning into action

Think back to the last conference you attended. If you're like us, you left the conference armed with new knowledge, ideas, and tools that you looked forward to bringing back to the workplace. But upon returning to work, you got busy catching up on emails, rushing to meet deadlines, and generally getting back in the swing of things. Your enthusiasm to integrate new concepts from the conference likely washed away within a few days, just as your ability to recall the finer points of learning also drifted away.

But what if there were ways to maintain that enthusiasm and reinforce the points you learned?

Consider **three ways to strengthen post-conference learning** among participants:



Implement a **BOOSTER PROGRAM** that reduces forgetting and encourages action.



Offer post-conference **DISCUSSION GROUPS** to encourage application of lessons.



Incentivize **BLOGGING** to deepen engagement with what people learned.

BOOSTER PROGRAM

A booster program reinforces participant learning and encourages application of new knowledge and skills at work to achieve results. The most effective booster programs use evidence-based learning approaches, such as effortful retrieval, spaced practice, and expert feedback to provide short, self-contained interactions. They are also easy for the participant to engage in and support tangible learning points or specific actions professionals can take at work.

One popular program consists of a series of emails delivered once or twice each week for 8 weeks, starting immediately following completion of the event. The emails ask questions—often multiple-choice questions—to prompt participants to consider important content as well as the process of adapting and integrating new knowledge, skills, tools, and techniques.

The emails provide added value to the participant while also providing conference organizers with opportunities to continue engaging with participants. By following up the conference with ongoing reminders that the conference offers value that supports improvement at work, participants are more likely to attend future conferences and recommend them to colleagues.

To put this idea into action, you could ask presenters during the planning stage to submit a session plan that includes **one fact or learning point** they want all participants to know by the end of the session, **why it's important**, and **what they can do with it back at work**. With this input from presenters, you could build a post-conference resource that reinforces key learning and action points from the conference. *See Resource section for an example of this idea in action.*

If your conference offers concurrent sessions, this means participants will be exposed to new learning even after the event, extending the value of the conference. There are software platforms that automate email deliver and track usage, such as BizLibrary's BoosterLearn, but the same general approach of supporting learning and encouraging application can be used with free tools like Survey Monkey or even short email messages. You can also develop and share post-conference resources that reinforce key points and encourage participants to apply new knowledge and skills in the workplace.

DISCUSSION GROUPS

Another way to extend the conference experience and support ongoing learning and the application of new knowledge, concepts, or tools is through post-conference discussion groups. Discussion groups can be structured—according to conference session tracks, function areas, or other themes—or they can be unstructured. Here are two ways we have used discussion groups:

Post-conference sharing: Within Washington Nonprofits’ larger learning strategy, nonprofit networks meet every other month. These networks provide an existing structure in which conference participants can come together 4-6 weeks after the conference to share what they learned and plan to do with that learning.

Follow up events: One popular keynote speaker addressed network leadership as a new way to think about problem solving and collaboration. A core group at the end of the day wanted to push further on the idea and asked for a follow up event. We offered that follow-up event, bringing the speaker back for a hands-on session that applied network leadership to the issues in that community. This approach is being replicated for other communities to support post-conference discussions on compelling and important topics.

Although many conference attendees will not participate in these post-conference programs, you can support a core group that’s motivated to continue the conversation. Keeping these types of leaders engaged may be important to your organization’s strategy.

BLOGGING

A third way to extend the value of the conference is to incentivize participant and presenter generated blogs.

Presenters can share the essence of their talking points in blog entries. The depth of information won’t be the same as what they shared in the session, but their blogs can benefit more people in your community than are able to attend the conference. It’s also a great way to raise the profile of your speakers and your organization.

Blogs can also be a great way for participants to synthesize and share important points from the conference experience. And especially if they discuss in the blog not only what they learned but also how they can use it in the workplace, they are even more likely to at least take that first step toward application. Many conference organizers rely on volunteer support during the conference to support and enhance the participant experience. Volunteers generally attend the conference for free or at a reduced cost and have opportunities to attend sessions. As ‘compensation’ for the valuable learning experience, why not ask them to write a blog based on their conference experience? We’ve included an example from a

Participants are even more likely to take that first step toward application if they blog about not only what they learned but also how they can use it back at work.

conference volunteer at Humentum’s 2018 Annual Conference in this chapter’s Helpful Links.

As added benefit, participant blogs will help you understand how they really benefited from the conference. This leads to the next section of this chapter.

2. Learn from the conference experience and turn your learning into action

Although your focus has been on the participants’ learning, you also need to consider your own learning. After the conference ends, you want to know what went well, what could go better next time, and how participants are benefitting from the conference.

We see four main ways to learn about the impact of your conference. Whatever you do, remember to plan your post-conference learning activities well before the end of the conference, leveraging the same urgency and focus for the event to ensure post-conference activities remain a priority even after the adrenaline from delivering the conference has faded.

- Pro-actively engage **STORIES** and **ANECDOTAL INFORMATION**
- Collect feedback through **SURVEYS**
- Conduct an in-house **CONFERENCE DEBRIEF** with staff and key partners.
- Consider a public **AFTER ACTION REVIEW** if a public forum is appropriate

Let’s dive into these one by one:

STORIES AND ANECDOTAL INFORMATION

As noted above, if your conference participants write blog posts about not only their conference experience but also how the conference has helped them back at work, you will have rich anecdotal data. It’s unlikely, though, that a large number of participants will write blogs, so you’ll need to take other steps to get feedback from your participants.

Remember the booster program mentioned above? You can use that same program to solicit additional feedback from participants once they’re back at work. Participants can provide feedback to specific questions—such as, “We hope you experienced some great moments at the conference. What were your favorite sessions, moments, or interactions at the conference and why?”

SURVEYS

The most common approach for feedback, of course, is through session and conference evaluations or surveys. Since this is likely already on your radar, we’ll just share a few tips.

Be stingy with the questions you ask and only collect information you'll act on. It's tempting to ask participants a range of questions on the end-to-end conference experience, but you need to determine what you might do differently based on the data you collect for each session and the conference overall.

Remember those conference goals you established during the planning process? Those same goals are an excellence reference to help you decide which questions to include in your survey. The survey is an opportunity to collect data from participants to determine whether those goals were met. Here we see how alignment from planning to execution to evaluation can support decision-making and purposeful action.

Also, keep the questions relatively easy to answer. The best conference surveys I've seen ask 3 or 4 questions—usually a few close-ended questions that collect the main data points and then an open-ended question to allow participants to share more feedback.

If you want participants to complete the evaluations, and we hope you do, remind them to do so and dedicate time for survey completion. Place staff or other designated attendees in the session rooms to remind participants to complete session surveys at the end of each session. And ideally, save a couple of minutes before the session breaks to do just that. After the conference, send a reminder email with a link to the full conference survey. **Without encouragement and dedicated time, even the most thoughtful and helpful participants are unlikely to volunteer their feedback.**

CONFERENCE DEBRIEF

You and others involved in conference planning and execution should discuss and debrief the conference. Staff feedback can be collected through shared documents (such as Google docs) or internal surveys or through meetings. These are powerful opportunities to capture lessons learned and discuss new ideas for the next conference while the recently completed conference is still fresh on everyone's minds.

One approach is to ask all staff involved in conference planning and execution to provide their thoughts and suggestions based on two different perspectives:

1. The planning process
2. The participant experience

For each of these perspectives, you can collect the following information in a spreadsheet:

- What went well?
- What needs improvement or was a problem?
- What great ideas do you have for next year?
- What are your recommended action steps to incorporate this into future conference planning?



AFTER ACTION REVIEW

After action reviews are discussions with key stakeholders who have reviewed whatever data is available and arrived at the meeting prepared to discuss ways to build on success and correct shortcomings. The common template for these discussions is to restate what you set out to accomplish, discuss what actually happened, explore lessons learned, and set goals for next time. If you're confident and open, you could even discuss lessons learned in public forums, such as podcasts, webinars, or blog posts. Our friends at Tagoras lead the way in sharing their after-action review discussions publicly. We've included the link on the next page.

After-action-review talking points:



Chapter 4 Summary

KNOW

1. You put a lot of work into creating a conference that offers rich learning and networking opportunities. But the real benefit starts when your participants return to the office, so help **EXTEND THE VALUE** of the conference.
 - a. After the conference, reinforce key points and encourage application of new knowledge, skills, and tools
 - b. Establish post-conference discussion groups
 - c. Encourage participant and presenter-generated blogs
2. Participant **FEEDBACK** can help you do even better next time, but evaluations need to be short and purposeful and ideally tied to measuring success against conference goals.
3. **AFTER-ACTION REVIEWS** allow for internal debriefing, allowing you to capitalize on the best aspects of the recently-completed conference and to make corrections as necessary.

SHOW

If you were to implement these ideas at your conference, we would hopefully see:

- Engagement with participants that extends beyond the timeframe of the conference.
- Participants sharing feedback on their conference experience, the aspects of the conference that have stuck with them after the conference, and how the conference has helped them in the workplace.
- The conference planning and execution team reflecting on the conference experience and taking action to create an even better conference next time.

HELPFUL LINKS

- Example “After Action Review” from the Tagoras “Learning Technology Design (LTD)” Conference in 2018: <https://www.leadinglearning.com/episode-124-mid-action-review-ltd/>
- Blog example: <https://atlascorps.org/ha-moment-humentum-conference-2018/>

See the **RESOURCE** section of this eBook for samples and templates related to this chapter.



CONCLUSION

The best conferences provide participants with engaging, useful, and meaningful learning and networking opportunities. Participants flow naturally from session to session with purpose and intent while gaining inspiration, ideas, and tools they can and will use in the workplace.

To participants, the conference makes perfect sense and seems like the most natural way to organize and deliver a powerful experience that will lead to improvements back at work. Of course, the end of the conference is only the beginning of the real journey for participants who return to work armed with practical ways to improve performance and achieve results. When back at work, participants not only apply what they learned but also look forward to the next conference and encourage their colleagues to join, too.

As sensible and organic as it seems to participants that optimal conference experience is only possible with careful planning, preparation, presenter support, and execution.

As you consider planning your next conference remember to:

- **Connect conference strategy** to your overall organizational and learning strategies and make decisions that help achieve strategic objectives
- **Prepare participants and presenters** for the best possible experience by incentivizing team attendance, using the registration process to learn about your audiences, introducing priming activities, and helping presenters consider ways to be engaging and action-focused
- **Support effective learning during and after the conference** by offering relevant sessions that align with basic adult learning principles, considering participant-led activities, and supporting reflection
- **Take time after the conference to capture lessons learned** and successes so your next conference can be even better!

We've enjoyed developing this eBook based on our experiences as conference planners and participants. In the year since writing the first edition, we've appreciated the feedback our readers have given us and opportunities to share and discuss these ideas at conferences. We feel this second edition of the eBook provides even more concrete suggestions to support conferences that make a difference.

We continue to believe conferences are wonderful opportunities to bring people together into a community that learns, shares, and grows together.

And we hope that next time you announce registration is open for your conference, you and the future participants are confident in the value of the experience.

We hope to see you at a learningful conference soon!

– Nancy & Mark

RESOURCES

Throughout this eBook, we have referenced templates and samples. This next section is where you can find them. We have organized them by chapter. We have put them on this website if you would like to adapt them to your conference: www.Aim4Action.com



CONFERENCE STRATEGY & OVERALL APPROACH

- Conference Checklist
- Conference Strategy: Template
- Conference Strategy: Explanation & Examples



GET READY: PRE-CONFERENCE ACTIVITIES

- Workshop Planner
- Conference Presentation Tips (for presenters)
- Conference Planner (for participants)



THE BIG DAY: DELIVER A DAY THAT MAKES A DIFFERENCE

- Program Reflection Page
- Program Sample Session Descriptions
- Guidance for Program Session Descriptions
- Table Talk Directions
- Conference Graphic Organizer (“place mat”)



MAKE IT STICK: POST-CONFERENCE ACTIVITIES

- Learning Retention Support
- Learning Retention Example

Conference Checklist

We put the main lessons in this eBook into one checklist. Share this with your team to bring everyone together around the elements of a learningful conference.

STRATEGY & APPROACH

What is the purpose of your conference? What do you need your conference to accomplish and how will you accomplish that? Will conference participants learn at the conference, be in a position to apply new knowledge and skills in the workplace, and achieve results?

Apply adult learning principles to conference activities by:

- Keeping it simple
- Giving participants opportunities to make it their own
- Helping participants remember key take-aways
- Helping participants take it back to work

BEFORE THE CONFERENCE

What can you do before the conference starts to prepare the participants, presenters, and program?

- Incentivize teams to support peer learning and accountability
- Gather information through the registration process
- Start the learning through priming activities
- Prepare presenters to be excellent and action focused (*see other side for facilitator tips*)

DURING THE CONFERENCE

How can you ensure learning is meaningful and accessible during and outside of sessions?

- Include participant-led learning within your schedule of speaker-led programming
- Set aside time for individual and peer reflection into the schedule
- Provide printed materials that help participants organize their ideas
- Support logistics in ways that increase opportunities and remove barriers

AFTER THE CONFERENCE

How will you support learning after the conference so participants can benefit in the workplace and so your next conference is even better?

- Reinforce participant learning and encourage action in the workplace
- Deepen your own learning about the conference experience

Conference Strategy: Template

GOAL 1:		
OUTCOMES:		
ACTIVITIES		
Before:	During:	After:
EVALUATION:		

GOAL 2:		
OUTCOMES:		
ACTIVITIES		
Before:	During:	After:
EVALUATION:		

Conference Strategy: Explanation & Examples

GOAL: This can be an organizational goal or something more specific. It's likely to be in support of **reach** (e.g. the number of participants you want to reach through learning events), **revenue** (e.g., the financial contributions that learning events will bring to the organization, and/or **results** (e.g., the impact that your learning events will have on individuals and organizations).

Examples:

- Nonprofits and philanthropy collaborate to solve community challenges
- Nonprofits use public policy as a tool to achieve their missions
- Nonprofits work for equity within society
- Nonprofits have the funding they need to carry out their missions

OUTCOMES: What can you accomplish at the conference to help achieve this goal?

Examples:

- Nonprofits have access to new learning tools on advocacy and public policy.
- New connections are formed between nonprofit and philanthropic leaders.

ACTIVITIES

What can you do before, during, or after the conference to drive those outcomes? For example:

Before:

- Recruit presenters on key topics, then provide presenter support (training, resources, guidance) before the event
- Curate and share relevant resources (books, videos, eLearning) with participants to prime learning
- Offer incentives and reasons for groups
- Partner with strategic groups going into conference planning

During:

- Facilitate opportunities to share and collaborate (not just listen to sessions)
- Plan time and space for participant reflection
- Provide printed materials
- Plan and support logistics to enhance the participant experience
- Offer social and networking opportunities

After:

- Drive learning within your organization
- Support learning and application of new knowledge and skills
- Continue to support convening/connections
- Share session feedback with speakers
- Go beyond evaluation feedback to ask for future commitments and contributions

EVALUATION: How will you know you have been successful?

Examples:

- Increased engagement in our public committee/ newsletter
- Surveys on confidence and access to resources
- Actions taken in our "call to action"

Workshop Planner

Topic of presentation		
Purpose. What are you hoping to achieve through this workshop?		
<p>Action outcomes. Participants will be able to <u>(action)</u> by the end of the session. This action should be something that you will be able to test for or see.</p> <p>1.</p> <p>2.</p> <p>3.</p>		
Opening introduction. How will you interest them in the topic from the start?		
Participant engagement. How will you get them talking within the first 10 minutes?		
Look at your Action Outcomes. This section is to plan the lessons that lead to these outcomes.		
Lesson 1	Activity	Test for understanding
Lesson 2	Activity	Test for understanding
Lesson 3 (optional)	Activity	Test for understanding
Closure		

Conference Presentation Tips

You have an hour or 75 minutes to share your wisdom with a group of people. You dig out your PowerPoint and edit your notes to make sure you have everything they need to know in one place. But wait! There are a few tips to remember before you walk into the workshop:

Tip 1: No matter what you do or how you do it, start with the end in mind

The end of your session is the *start* of the journey for your participants. Think about what they're leaving with from your session.

Consider this question: What do you want participants to know or be able to do by the end of your session?

Tip 2: Less is more

You want to be generous with your expertise, but rather than conveying a career's worth of wisdom, help participants learn or do one or two important things. Tell them everything, and they will remember nothing.

Consider this question: Can you capture the main take-aways from your session in a tweet?

Tip 3: Use PowerPoint wisely

PowerPoint should support what you're saying but should not repeat or replace your talking points. It is your back-up singer—you are the star of the show. Clean graphics or bold images with just a few key words usually work best.

Consider this question: Could you still present your session if the PowerPoint doesn't work?

Tip 4: Don't talk for more than 10 minutes at a time

You certainly have wisdom and experience to share, but participants need time to reflect on or work with the content. You don't need to facilitate highly participatory activities, but you should give participants an opportunity to ask questions, reflect, or discuss key points with a neighbor.

Consider this question: Do you have natural break points during your session to allow participants to reflect on your content and make it their own?

Quick tips

- If you facilitate small group work, provide clear written instructions and allow adequate time for participants to engage. Small group work usually requires more time than you anticipate, so limit the scope of small group work or plan for small group work to take longer than expected.
- If you collect participant input on a flip chart while facilitating discussion, ask a participant to be your scribe. Note taking while also facilitating discussion is challenging.
- Help participants consider the following questions at the end of your session:
 - What's one thing I learned?
 - Why is it important?
 - How can I use it?
 - What other questions does it raise?

CONFERENCE PLANNER

Make the most of this day away from your desk with an amazing set of peers and experts from across the region! Take time before the conference to reflect, plan, and connect with your team.

Reflect.

What are you most looking forward to?

What goal (or goals) does your organization have that you would like to move forward?

Who do you want to meet?



Get ready for times when we are together.

KEYNOTE 8:00-9:30am	LUNCH 12:30-1:30pm	PLENARY 3:00-4:15pm
The New Network Leader	Inspiration	Philanthropy
<p><i>What is the most essential ingredient in a successful collaboration?</i></p> <p><i>What collaborations of yours have that element?</i></p>	<p><i>Who inspires you? Why?</i></p> <p><i>If you could ask advice of— or give advice to – someone coming into nonprofits or at the end of their career, what would you say?</i></p>	<p><i>If you could change one thing about how nonprofits or philanthropy function, what would it be?</i></p> <p><i>What would you be willing to give up to get that?</i></p>

Get ready for workshops.

Circle the workshops you plan to attend. Are you coming with a team? Talk together about how to spread out across workshops.

	Fundraising	Collaboration	Managing People	Mission-centered strategy	WA Conversations
10:00-11:15	3 Key Strategies for Developing Your Individual Giving	Network Leader Mindset: Making the Case with Your Staff, Board, and Funders	Managing Risk in Conflict and How to Talk About Bias and Equity	Using Finance Strategy to Achieve Your Mission	<i>The Future of Nonprofits</i>
1:30-2:45	Donor Stewardship: How to Support Your Donors	Stories Aren't Enough: How to Tell Your Story with Data that Show Results.	Managing Change and Conflict in Nonprofits	Lift Your Voice: Getting Started with Advocacy and Lobbying	<i>Successful Service of Alcohol at Your Event</i>

What is one thing you hope to get out of the workshops?

Get ready for Table Talks.

It is great to hear from experts. It is also powerful to have a conversation with peers about a topic of great importance to you. Circle 3 topics of interest to you. (Note: List subject to change.)

Civics

Census 2020
Improving civic engagement
Nonprofits & state government

Fundraising

Changing donor expectations
Donor stewardship
Events
Raising general operating support
Small shop fundraising
Successful fundraising campaigns

Leadership

Building a great board
Executive Director Round Table
Getting your board engaged
Rural community leadership
Rural Executive Director Table
Succession planning

Operations

Human resources in nonprofits
Information management:
databases and more

Insurance 101

Managing nonprofit risk
Nonprofit finance
Small nonprofits
Using data better

People

Building great volunteer programs
Caring for the caregivers (self-care)
Cultivating collaboration
Engaging Millennials
Focus on equity & inclusion

What would you like to get from this conversation?

What idea or tool do you have to offer?

Get ready for conversations with exhibitors.

These partners will bring tips, tools, and connections for nonprofits. What questions do you have?

- | | |
|--|--|
| <input type="checkbox"/> 501 Commons | <input type="checkbox"/> Ostara Group |
| <input type="checkbox"/> Amerigroup | <input type="checkbox"/> United Way of Central WA |
| <input type="checkbox"/> City University | <input type="checkbox"/> WA Corporations & Charities |
| <input type="checkbox"/> Fleur Larsen Consulting | <input type="checkbox"/> WA Liquor Cannabis Board |
| <input type="checkbox"/> Gorilla Give | <input type="checkbox"/> Warm Beach Camp & Conference Center |
| <input type="checkbox"/> Great American Insurance | <input type="checkbox"/> Washington Nonprofits |
| <input type="checkbox"/> NonProfit Insurance Program | |

Program Reflection Page

Moving from Reflection to Action

Morning Plenary: Leadership through challenging times

Name one take-away _____

What one action will you take? _____

Who will help you or play a role in this action? _____

What do you need to share with your team
when you get back to the office _____

Session 1:

Name one take-away _____

What one action will you take? _____

Who will help you or play a role in this action? _____

What do you need to share with your team
when you get back to the office _____

Section 2:

Name one take-away _____

What one action will you take? _____

Who will help you or play a role in this action? _____

What do you need to share with your team
when you get back to the office _____

Session 3:

Name one take-away _____

What one action will you take? _____

Who will help you or play a role in this action? _____

What do you need to share with your team
when you get back to the office _____

Networking

Who did you meet today?

Program Sample Session Descriptions

Client Voice: How to Develop a Sustainable and Equitable Process to Hear Who You Serve

[Presenters]

Hearing directly from the people we serve is critical. Limited capacity sometimes stops those conversations before they begin. Even organizations with deep experience and commitment to racial equity run into unanticipated challenges when seeking client feedback. We will explore ways to create an inexpensive, replicable, and impactful client feedback process through a racial equity framework. Jointly presented by a black woman and a white woman in respectful, collaborative partnership, this workshop invites you to fearlessly begin designing your own authentic and equitable client voice process.

Intended audience: Experienced staff and board leaders, emerging leaders and students.

Better Together: Fundraisers and Volunteer Managers Working Together to Advance Your Mission!

[Presenter]

Fundraisers and volunteer managers play an essential role in building a nonprofit's capacity to accomplish mission, reach financial stability, expand to scale, and achieve organizational success! Fundraising and volunteer engagement are "two peas in a pod," yet there exists a divide in the nonprofit sector between the people raising the money and those managing volunteers. We will examine this divide and explore opportunities for reaching across the aisle to our fundraising colleagues to work more effectively together.

Intended audience: Experienced leaders, fundraisers, volunteer managers and other staff members, emerging leaders and students.

How to Craft a Winning Online Fundraising Plan

[Presenter]

The online fundraising landscape is constantly evolving. While engagement strategies and donation processes may change, online giving is here to stay. Come explore the essential elements of an online fundraising plan. Learn how to create or update your existing plan and incorporate it into your annual giving strategy. Topics will include donation pages, metrics, social media, email, mobile, and more. Walk through each aspect of an effective plan while you assess your own fundraising efforts.

Intended audience: Experienced nonprofit staff and development leaders interested in advancing your digital fundraising efforts.

Guidance for Program Session Descriptions

Good session titles and descriptions **align** and **prime** participants. They **align** the right participants with relevant and important topics delivered at an appropriate level using effective methods. And they **prime** participants by helping them understand the overall context going into the session and the take-aways they can expect when the session is over.

Tips for Writing Session Titles

Participants might only read the session title when selecting sessions—especially when there are multiple concurrent sessions during time slots. Treat the title as a headline that grabs attention but doesn't sacrifice a clear description in lieu of something cute and clever. Keep titles relatively short—try for no more than 15 words—and free of overly technical language. Focus on the problem to be solved or solution to be discussed. Here are some examples:

Example	Comments	Possible revision
The Great Money Grab!	<i>This might grab my attention, but it doesn't tell me enough about the session. I would need to read the full description to understand whether I'm interested in attending.</i>	Fundraising 101—Strategies to Improve Your Financial Position and Your Brand
Leveraging AI to Optimize HPT in Multinational Matrix Entities	<i>Overuse of jargon and acronyms. Unless you're trying to signal the advanced level of a session with the title, this language can be simplified to be more accessible.</i>	How to Use New Technologies to Drive Performance in Complex Organizations
Hufflepuff or Gryffindor? Managing Diverse Teams in a post-Harry Potter World	<i>Cultural references that seem clever and obvious to you might be too obscure for your audience to understand.</i>	Celebrate Diversity! Five Tips for Managing Diverse Teams

Tips for Writing Session Descriptions

Be Participant-focused:

- Explain why the session is important. What urgent or important problem will it help them solve? What advantage will they gain?
- Appeal to the purpose of their work. What's important for them to be successful in their role?
- Help them understand what they will experience (e.g., session methodology) and what they will walk away with (e.g., inspiration, information, practical tips, tools)

Use plain language:

- Shorter sentences are generally better, but several short sentences in a row can become tedious. Vary sentence length.
- Avoid acronyms, technical, or specialized terms unless you're certain they will be understood by everyone
- Use active voice (e.g., "You will learn to create pivot tables" rather than "Pivot table creation will be learned by participants.")
- Don't repeat information. This is a short description, so make every sentence count.

Define the intended audience (i.e., level your sessions):

Below we offer several ways to define the intended audience for each session. Select one approach that works best for your participants and use it consistently throughout your materials.

- Level sessions by proficiency level based on the content. Levels could include: Novice, Intermediate, Proficient, Expert (e.g., This session is meant for people with an intermediate level of proficiency on the topic)
- Level sessions by seniority or years of experience, such as: Senior Leader, Manager, Associate (e.g., This session is intended for Senior Leaders of the organization or This session is intended for attendees with 10+ years' experience on the topic)
- Provide a specific description of the intended audience for each session (e.g., Intended audience: Experienced nonprofit HR professionals and leaders looking to update their onboarding process)

Other:

- You may want control over the final version of the session title and description, but make sure the speaker agrees that the language accurately describes the session.
- Consider using a tool like Grammarly to ensure you're using good grammar and clear language.

Table Talk Directions

11:30-12:15pm

Thank you for your service! We believe that it is important to create space in which participants can talk about the issues most on their minds. **Our goal is to strengthen the peer network that connects us and leverage the “knowledge in the room” to share resources and ideas**

Instructions

1

Please find the table assigned to your topic by 11:25am so that people know that your group will be meeting. We will start at 11:30am in Ballroom E and Room F (see schedule for where your session will be.)

2

- Identify a **note taker**. Use the paper provided to capture the main ideas of your group.
- Please have everyone sign in with his or her name and email address on the enclosed form.

3

- Introduce yourself and invite everyone around the table to introduce themselves. Possible prompts:
 - What drew you to this topic?
 - What would you most like to learn/share about this topic?

4

Conversation: Choose a few topics of most interest and invite people to go deeper on these ideas. Over the course of the hour, you will probably have time for 2-3 topics based on how the conversation goes. Some ideas for questions are:

- What is the biggest challenge of this topic?
- What are some ideas that have worked?
- What do you need to know more about in order to better understand this topic?
- What ideas do you have that you would like to float with this group of peers?
- What tool or resource has been helpful/ could be helpful to you?

5

- At 12:10pm, start to wrap-up your conversation. Ask the note-taker to summarize what you have talked about.
- Invite people to share next steps that they would like to pursue.
- Invite people to share business cards to stay in touch.
- Please give the sign in and yellow sheets to someone at the Washington Nonprofits table.

At some point during your conversation, look around the room and see all of the awesome nonprofit people around you talking, connecting, sharing, and imagining. **Thank you for your role in making this happen!**

Conference Graphic Organizer ("place mat")

Developed in collaboration with keynote speakers
Illustrations by Margaret Schulte, 3 Choices Communications

Central Washington CONFERENCE FOR THE GREATER GOOD

The New Network Leader: How You Can Grow Your Impact

Featuring Jane Wei-Skillern, PhD & Marty Koolstra

**Network Leadership:
A mindset shift rooted in four principles:**

- Mission, not organization.
- Node, not hub.
- Humility, not brand.
- Trust, not control

BEFORE: YOUR CURRENT PARTNERS

AFTER: YOUR DESIRED PARTNERS

What resonated with you?

What are your reactions to the case studies?

What are your next steps?

What are the barriers holding you back?

Graphic organizer by Washington Nonprofits and 3 Choices Creative Communications. Copyright 2018 Washington Nonprofits

PEOPLE MATTER

Create a vibrant picture of the future
Akaya Windwood

One thing I uniquely bring to the world

A big hope I have for our collective future

How I want to contribute

Encouragement & support I will need

Someone I want to reach out to

Central Washington CONFERENCE FOR THE GREATER GOOD

Graphic organizer by Washington Nonprofits and 3 Choices Creative Communications.

Learning Retention Support

Participant learning doesn't need to end when your conference is over. Your work helping them remember doesn't end either. One way to keep learning going and support remembering is to solicit input from speakers to generate quiz-type questions and learner feedback.

Ask your speakers to answer four questions based on their conference session:

1. What tangible piece of knowledge or information you want participants to remember?
2. Why is this important for them to know or understand?
3. How can they use this in their work?
4. What results can it help them achieve?

This can be done by speakers as they develop their sessions. It can complement their process and shouldn't be seen as an additional burden. Keep in mind if you're asking an expert to provide this information, s/he doesn't need to provide perfectly crafted answers to the responses. As long as the answers are accurate and thoughtful, you will be able to develop multiple-choice questions and learner feedback based on their short responses.

Here's what you might receive from someone speaking at your conference about *learning retention*:

1. What tangible piece of knowledge or information do you want participants to remember?

A learning event that doesn't offer learning retention is unlikely to lead to change in the workplace and improved results. Effortful retrieval and spaced practice are evidence-based techniques that can reinforce learning.

2. Why is this important for them to know or understand?

Developing and delivering learning events requires a considerable investment of effort and resources. If learning events don't lead to changes and improvements, those investments will fail to yield the results they could achieve. With a small additional investment, learners can be better supported to strengthen learning, apply new knowledge and skills, and achieve results.

3. How can they use this in their work?

They can use this four question technique to develop content to use to write multiple-choice quiz-type questions and feedback to help learners deepen understanding of how to apply new knowledge and skills successfully to achieve important results. Questions can be delivered by tools like Survey Monkey or software designed to support learning retention.

4. What results can it help them achieve?

This will help them strengthen learning among participants and, more importantly, achieve programmatic results and organizational goals. Ultimately, it will help the learning & development function fulfill its promise of helping individuals excel at their jobs, which will be good for the organization (and recognized as valuable by leadership).

With this information, you can create a multiple-choice question. You can generate answers to those questions. With a few of these questions, you can create a quiz to email out to participants sometime after your event. Using the information above, we have created a sample multiple-choice question with learner feedback to help you see how this works.

Learning Retention Example

Concept to reinforce		Learning retention helps drive results
Question	The Executive Director at your organization expresses disappointment in the tangible outcomes from a recent organization-wide training program meant to improve management practices. She indicates the organization might stop “wasting resources on training that doesn’t work.” As a learning professional at the organization, what should you suggest?	
Correct Answer	Implement a learning retention strategy that encourages effortful retrieval and spaced practice	<i>The feedback given if this answer is chosen</i> That’s right. Effortful retrieval and spaced practice are effective approaches to reinforce learning initiated during a training event. Multiple-choice quiz-type questions are good ways to help learners deepen understanding to apply new knowledge and skills successfully and to achieve important results. Questions can be delivered with tools like Survey Monkey or software that’s specifically designed to support learning retention. This approach will help learners strengthen learning, and, more importantly, achieve programmatic results and organizational goals. Ultimately, it will help the learning & development function fulfill its promise of helping individuals excel at their jobs. This can also help convince the CEO that training plays an important role in organizational development, but training alone is not sufficient. With a small additional investment, learners can be better supported to strengthen learning, apply new knowledge and skills, and achieve results.
Distractor	Create a series of micro-learning videos to reinforce key learning points	<i>The feedback given if this answer is chosen</i> We wouldn’t suggest creating short videos to reinforce key learning points as they would likely not offer participants adequate opportunities to <i>retrieve</i> the information to reinforce learning. Learning retention that offers both effortful retrieval and spaced practice—like multiple-choice quiz-type questions—can help learners deepen understanding to apply new knowledge and skills successfully and to achieve important results. Questions can be delivered with tools like Survey Monkey or software that is specifically designed to support learning retention. This approach will help learners strengthen learning, and, more importantly, achieve programmatic results and organizational goals. Ultimately, it will help the learning & development function fulfill its promise of helping individuals excel at their jobs. This can also help convince the CEO that training plays an important role in organizational development, but training alone is not sufficient. With a small additional investment, learners can be better supported to strengthen learning, apply new knowledge and skills, and achieve results.
Distractor	Replace the training with job aids and performance support	<i>The feedback given if this answer is chosen</i> Job aids and other performance support tools could supplement training, but it’s unlikely they can replace learning events. However, learning retention that offers both effortful retrieval and spaced practice—like multiple-choice quiz-type questions—can help learners deepen understanding to apply new knowledge and skills successfully and to achieve important results. (<i>Remaining feedback is same as above following sentence ending “achieve important results.”</i>)



Conferences That Make A Difference

Nancy Bacon
Mark Nilles

www.Aim4Action.com