

HARRY VAN BOMMEL

# Event Planning Guide

Essential Handbook of Meeting, Conference & Workshop Success  
for Charity & Not-for-Profit Organizations

Whether your event is a simple meeting of ten people or a conference of 500 attendees, the basics of event planning remain the same. This no-nonsense guide provides all the resources you need to prepare for, and conduct, a successful meeting, conference or workshop – including detailed, practical information on choosing a speaker and a venue, budgets, day of the event and post-event activities, and promotion and publicity.

Beyond laying out the complete process with step-by-step ease, the *Event Planning Guide* provides examples of the forms and checklists you can use to ensure you get things done right, and on schedule. Purchasers of the book also receive access to a website where they can download and print the forms for their own use.

*“Essential reading for all event planners. No matter how well organized you are, it's impossible to think of everything and plan ahead for every eventuality. This guide is structured in a way that you can feel confident you've covered everything to ensure that your event is a huge success.”* – Cathleen Fillmore, President, Speakers Gold

**Harry van Bommel** is the author of 28 books and has appeared in over 150 television, radio and print media interviews. He speaks nationally and internationally on topics covered by his books including management and staff development, learning skills, home and hospice care and personal development.

Mr. van Bommel is the Director of the Professional Skills Development Institute. He has a Masters Degree in Adult Education and has been an educator and consultant since 1981. He holds the professional designation of Certified Training and Development Professional (CTDP) – one of only about a 100 professionals to do so. His list of clients include people and organizations and companies in health care, education, industry, and social services.



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Produced in association  
with the Media Futures Institute

HARRY VAN BOMMEL

EVENT PLANNING GUIDE

LEGACIES

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## Essential Handbook of Meeting, Conference & Workshop Success

FOR CHARITY & NOT-FOR-PROFIT  
ORGANIZATIONS

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**Harry van Bommel** is the author of more than 25 books and has appeared in over 150 television, radio and print media interviews. He is an adult educator with specialties in the fields of home and hospice care; adult education; management and staff development; care giving and publishing. He speaks to audiences in health care, business, education, government and industry. With over 25 years of experience, Harry's focus has consistently remained one of providing people with practical, easily accessible information. He speaks nationally and internationally on topics covered by his books including management and staff development, learning skills, home and hospice care and personal development.

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Meeting, Conference & Workshop Success**

FOR CHARITY & NOT-FOR-PROFIT ORGANIZATIONS

**HARRY VAN BOMMEL**



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## Acknowledgements

How you plan is partly based on your general work style. To make sure my own work-style preferences have not biased this book, I have asked other event planners and speakers to review the material.

I am grateful to the following reviewers for adding clarity, information and encouragement for the readers.

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**Deb Thivierge** is a management and organization development consultant with many years experience organizing special events and educational programs.

My love and gratitude to **Janet Klees**, my life's partner and guide, who did the first edit of this book. Janet's experience as a writer, speaker and mentor to many has helped ensure that the content of this book was specific, relevant and immediately useful.

### DEDICATION

*To the individuals, groups and organizations  
who invite me to speak to them and whose ideas  
and work constantly refresh my own thoughts,  
actions and teaching.*

# Introduction

Whether your event is a simple meeting of ten people within your organization or a conference of 500 attendees, the basics of event planning remain the same. Anyone who has coordinated the schedules of ten people to attend a meeting in the same place at the same time understands that it takes more than a few minutes. It can take several hours to coordinate busy people's every-changing schedules.

On a grander scale, the details in planning a conference for 500 people can be overwhelming. It is often best to hire a professional conference planner for such events because they have a larger staff, more current expertise with all the venues in town, the suppliers, the caterers, etc. That said, you should still use the information in this book to ensure, for yourself as the organization's representative, that all the details are covered to your satisfaction and so that you come across as a knowledgeable client to the event planner.

**This book uses the example of planning for an event of about 100-300 people.** It is not a full scale conference but, perhaps, a day-long workshop or meeting with one or several speakers. This example will allow you to see the specific planning for such an event but also allow you to see how the information is applicable to what you are planning.

## A Note of Caution

Plan for the best outcome and expect things to go wrong. Like a wedding, the process can be joyful or painful depending on the attitude of the planners and participants. No wedding was ever perfect. There will be glitches. It is how you plan for and react to the glitches that defines whether the event was a success or not.

Take the process seriously but not solemnly. If you have no fun as the principle planner, then few other people will enjoy themselves either. There are people who come together 10 years after planning a major event who still greet each other with a laugh and a "Do you remember when....!" That is your goal. To plan an event when everyone involved feels pride in both the up-front planning and the event itself.

# Planning the Event

The most important decision to make in planning an event is “who is going to do the work?” Some would argue that it is more important to decide about the theme of the event or who the speaker(s) will be. It doesn’t really matter the order as much as a recognition that nothing will get done until someone or a committee takes on the event and makes it their own.

## One Planner or a Committee?

There are benefits and drawbacks to having either one person or a committee organize the event:

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### One Person Coordinator

**Benefits:**

- One person in charge of all aspects of the event – faster decision making
- There are often people within organizations who genuinely enjoy the opportunity of putting on an event – it can benefit their resume
- Other staff and/or volunteers can be recruited by the coordinator for specific jobs (often a better personality mix)

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**Drawbacks:**

- All the stresses rest on one person
- Few backups if person forgets important information

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### Event Committee or Workgroup

**Benefits:**

- Several people to share the load so that if one cannot fulfill their responsibilities, (e.g., illness, emergency) others can take over
- Possibly representatives from different departments to provide their perspective, expertise and to ensure everyone feels involved in the event
- Easier to provide transition from one event-planning committee to another
- Requires more documentation of how things are done rather than details kept in a single coordinator’s memory

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**Drawbacks:**

- Must accommodate people’s work and personality styles – possibility of more conflicts
  - Slower decision-making process to accommodate people’s schedule
-

## Time Lines for Preparation

Once a decision about the “who” is decided, the next big step is deciding how much time you have to prepare for the event. Sometimes that decision will be made by someone else and you will have to work within those deadlines. At other times, you will have more control over the timing of the event.

The size and complexity of your event will determine how much time you should spend on preparing for it. A meeting of 10 people, for example, may take only a few hours to organize a few weeks before the event. A one-day workshop with an out-of-town speaker(s) and participants can take between 2-6 months, depending on how many people can help you. A one-to-five day large conference can easily take 12-15 months to organize especially if you want to book well-known speakers and locate the event in a popular venue.

In Appendix 2 there is a draft of a 3-month time line plan to prepare for a one-day workshop. This is a sample only but will give you an idea of the major steps needed in planning for such an event.

There is software available that may help in your planning process. If you plan to do a lot of learning events and conferences, it is worthwhile finding a program that will provide help with budgeting, registration, name tags, speaker information, contracts, etc. Your organization may already have this software in their public relations, information technology or communications departments. Otherwise, check with a local event planner or software company to find out what is most suitable for your needs. Incorporate the cost of the software into your budget.

# Choosing a Theme and Type of Event

Whether you begin with the previous step (“who will do the work?”) or with choosing the theme and type of event is not important. Both need to be done almost immediately. Similarly the type of event you want and its length may determine the theme or vice versa. For example, a short seminar is not suitable for a theme of “changes in the global economy” as it would take much longer to discuss. Similarly, a one-day workshop for managers on “how to properly answer your telephones” is also unsuitable because it would be much too long for the topic and only a few managers would show up.

In choosing a theme and the type of event, you must first answer a few fundamental questions.

## Purpose and Audience

1. What do you want to accomplish with your event? You can divide this into two sets of objectives:
  - **educational objectives** (e.g., educational, problem solving, information sharing, selling, build consensus),
  - **experiential objectives** (e.g., motivational, entertaining, feeling part of a group, encourage team work).This will be your mission statement for the event.
2. Who is the audience? (Who are the participants? How many are expected? Who does the organization(s) want to be there and why?)
3. Who are the stakeholders to the event? Who has approval/decision making authority?
4. How long do you have?
5. What theme best meets the audience needs and those of the organization?
6. How much planning time do *you* have?
7. What type of venue is wanted; e.g., in-house, hotel, retreat, conference center?

The type of event will impact specifically on the budget, the attendance and the timing as well. For example, a one-day workshop with one well known speaker during a relatively “slow work period” is easier to plan, more economical and more likely to succeed than a two-day conference with multiple lesser-known speakers held in mid-December.

## Types of Events

Knowing what type of event it will be helps to choose a theme. Here are some options:

1. A meeting
2. A presentation to a group of people within your organization (an in-service, a luncheon presentation, a talk at a meeting)
3. A seminar (an hour or two)
4. A workshop (half-day, full days or several days)
5. A conference (one or more days)
6. A keynote address (at someone else's conference)
7. A party or ceremony (retirement, seasonal, a welcoming of a new colleague, an awards ceremony)

## Event Theme

Once you know the purpose, audience and type of event you want to hold, you can determine *the* theme. Consult with some of your potential participants (people attended) and stakeholders (people making decisions to hold the event) to make sure the theme fits their expectations. Often the needs are not entirely the same for both participants and stakeholders. It is important to meet as many of each group's needs as possible for the event to be successful and, perhaps, repeated in the future.

Themes can be either specific or general enough to give the speaker(s) some flexibility in their presentation. Too often, however, speaker(s) come with a 'canned' presentation with only nominal changes to their presentation to touch on the theme for the day. The more you discuss the theme with the potential speaker(s) the clearer their mandate will be.

Here are some different theme categories:

### **Immediate professional skills development around a specific set of learning needs**

- *Increase your communication skills by 50% in the next 30 days*
- *The 3 things supervisors can do to increase staff motivation and retention*
- *How to help people who are frustrated and angry*

### **Immediate personal skills development around a specific set of learning needs**

- *Balancing work and home life – it is possible!*
- *Stress and time management for a lifetime*
- *Resolving conflicts – why you must resolve them for your own sake; not for others*

**Emerging Trends** (in your area of service or expertise)

- *The effect of instant information through the internet on client expectations*
- *How the “back to a simple life” movement will affect HR recruitment and retention*
- *Balancing work and home life for young parents*

**Long-term strategic planning**

- *The global market and how it will affect you in the next 10 years*
- *Potential merger scenarios and how to deal with each*
- *Becoming a ‘learning organization’ in the new millennium*

**Collaborative relationship building**

- *Best case scenarios of interdisciplinary and inter-agency cooperation*
- *Why community health care organizations should lead the way*
- *The 7 best ways to encourage cooperation between organizations serving the same public*

# On Your Own or Working with Other Organizations

For a one-day event, it is not difficult for one organization to do most of the event planning. However, there may be a strategic benefit in combining the efforts of several organizations. For example, if three community organizations are trying to improve their working relationships with the same people they serve (e.g., a hospital, a community nursing group, a community support agency), then working together is one more way for staff and volunteers to get to know each other and enjoy the results of a successful event.

Aside from sharing the workload there are other benefits in working with other groups:

1. You expand your audience for the event (they will send some of their staff and volunteers where otherwise they might not)
2. You expand the marketing capabilities of the event by having each organization reach out to their own network of contacts
3. You have a greater likelihood of finding a free or lower cost venue for the event (e.g., one of the organizations may have a suitable room for the event or have contacts with a local hotel, community center or faith community hall).
4. You share the costs and risks.
5. You share the responsibilities.

Some of the disadvantages of working with other groups are that:

1. The process is likely to take longer as more people are involved who must talk with their organization before decisions can be made.
2. You share the revenues.
3. You share the 'goodwill' for the event.
4. You may have different approaches, personalities, agendas and goals.

Whatever decision you make, it is important to make the event as accessible, useful and cost effective for your allies in the community as possible. Events can be a wonderful opportunity to build bridges and open up new opportunities with others in the community.

# Sponsorships

Sponsorships provide a way to reduce the overall cost of an event (often with some or all of the sponsorship money available before the event) and/or a way to raise extra money. If you are holding a one-day workshop, for example, you may want one or more sponsors to pay for the speaker(s) fees, the room rental or other costs. Any profits from registrations and other sources could then be used to subsidize attendance or planning for future learning events.

Consider the following groups for sponsorships:

- local business,
- allied groups (i.e., groups similar to yours in purpose and audience),
- governments (local, regional, provincial, federal),
- charities/foundations,
- others you know about through your own network.

Start with organizations with which you already have a good relationship.

As well as these potential sponsors, ask your speaker(s) and any organizations you are working with on this event if they have any sponsorship contacts. A speaker may have a working relationship with a sponsor who helps cover some of the speaker's fee in exchange for one or more of the benefits listed below.

Sponsors want *something* in return for giving you hundreds or thousands of dollars. You can offer some or all of these benefits depending on how much the sponsor is willing to contribute.

1. You can offer exclusive benefits to one sponsor. *Exclusive* means the sponsor is the only one with the rights and benefits of sponsoring the entire event including the only one to have their name recognized by and with the event.
2. You can offer various levels of sponsorships. For \$1000 a sponsor gets Platinum recognition for their sponsorship (i.e., larger logo on materials, more visibility, best spot in an exhibit hall). Gold (\$500) and Silver (\$250) levels would also get recognition but in less visible ways. Alternatively, you can divide up sponsorship fees so that the Platinum sponsor sponsors the overall day while Gold sponsors lunch and Silver sponsors the snack breaks.

3. Each sponsor will have its corporate name and logo on all promotional material, any banners, and on handout materials for the workshop.
4. Sponsors can include a brief paragraph or welcome letter into the handout package for each participant outlining their commitment to your workshop theme.
5. Sponsors may have a booth or display at the event to promote their products and services. A special morning or afternoon break session can be included in the agenda for the day to provide extra time for participants to view the displays. Most sponsors value this one-on-one time with participants and, in turn, the participants want to remain up-to-date with current products and services that might help them in their work. One sponsor can be given exclusive rights to sponsor this break with snacks and drinks in return for the best location in the exhibit area.
6. The sponsors are reaching their niche market (e.g., baby boomers) and may provide each participant with a 'gift' of a pen, pad of paper or similar item with their name and logo on the items.
7. Each sponsor can promote their sponsorship of the event through their own newsletter, flyers, advertising, or banners at other events.
8. You can have a formal media launch to highlight the event and recognize the sponsors including an opportunity for photographs.
9. The sponsors will be reminded that they will have added name recognition within their community as an active 'partner' in promoting this event – i.e., excellent good will.
10. A mutual link between the web sites of the hosting organization and the sponsors is another way to provide sponsors with recognition and potential sales.

NOTE: Be conscious of sponsors that are perceived to be negatively linked with your overall theme or your own organization's general image. For example, it might to avoid having a casino sponsor a workshop on addiction prevention nor a cigarette company sponsor a health care event or a workshop for teenagers.

# Budget

It is important to keep track of the revenues and expenses for any event. Don't assume that little costs don't matter (e.g., paper clips, pens, markers, and tape) – if you do not keep track of these costs, you will not have a fair estimate of the actual cost-benefit to holding similar events.

One of the costs that may, or may not, go into a budget is actual staffing costs. This can be a misleading item in a budget unless you hire someone only for event planning. For example, if you are organizing a large conference, then the cost of hiring an event planner or company to do that for you is clearly an expense.

However, if someone in the organization takes on planning a one-day workshop as part of their work load, then you might choose not to include their time as an expense since you would have to pay them their salary anyway. The distinction is important only in regards to how much revenue you may want to generate from such an event. If the revenues are (1) to cover that person's salary and (2) raise funds from the event for other programming, then the registration fee would likely have to go up substantially to cover both goals. This may, in turn, reduce the number of people who want to attend the event.

Here are possible sources of Revenues and Expenses. Appendix 3 provides a simple example of a one-day workshop's budget.

## Revenues

- Registration fees
- Sponsorship fees
- Grants (e.g., from charities, not-for-profits, government sources)
- Advertising (e.g., in the event program, on flyers/brochures/posters and in handout material)
- Donated materials
- Donated room rental
- Donated audio-visual equipment
- Donated media pre-coverage and coverage of the event itself (newspaper, local radio and TV)
- Donated "Public Service Announcements"
- Donated "gifts"

## Expenses

- Speaker(s)'s fee
- Speaker(s)'s Travel and Accommodation
- Overhead for paper, copying, pens, pencils, markers, tape, etc.
- Room Rental including meeting space to plan the event
- Food (lunch, snacks, drinks)
- Audio-visual rentals
- Promotional materials (flyers, brochures, newspaper ads)
- Planning and registration software package to help organize all the information related to the event
- “Thank you” gifts, if any, to speakers, sponsors, staff, volunteers, and others
- Staffing costs (on a per hour basis)
- Any extra costs to assist/accommodate people with their physical or intellectual needs. Ask participants if they require any assistance to fully participate in the event rather than offering a ‘blanket’ accommodation to everyone which often looks good on paper but is expensive and rarely meets individual people’s needs. For example, *it is not necessary to have:*
  - all of your handout material transcribed into Braille if no one needs it,
  - translation devices for an audience where everyone speaks English,
  - portable ramps to enter and leave the building if no one is using a wheelchair.
- Quietly offering individuals what they require is often less expensive, less time-consuming and much more appreciated.
- Insurance – often the venue has insurance to cover some of the items below. Some of the other items may be unnecessary to insure against (e.g., speaker cannot make it) because you have a back up speaker available locally.
  - for damages to venue,
  - for canceling the event due to circumstances beyond your control, e.g., extreme weather conditions (e.g., flooding, hurricane), airline or transit strike, terrorism
  - failure of the speaker(s) to appear
  - for liability, e.g., loss or damage to participants’ property, a participant’s injuries while at the workshop
  - failure to vacate the venue on time
  - legal and contractual liabilities

Some of these costs must be covered up-front. For example, speakers typically charge 50% of their fee in advance to reserve that date. The remaining fee is due on the day of presentation. Hotels, audio-visual companies, promotional materials, may all require at least a deposit if not the full amount.

Sponsorships will help cover some of those initial expenses up front. Registrations would be used to cover the remaining costs on the day of the event or soon after.

In determining whether an event can go ahead or not, it is important to know what other sources of money you can use up front to cover early expenses. One source might be from the education, professional development or the public relations budgets within your organization. You will, naturally, have to return the loan immediately after the workshop.

It may be helpful to create a proposed budget (revenue and expense estimates) before contracting with the venue, speaker(s), etc. to determine if you have sufficient up-front money and expected returns to make the event financially successful. The greatest risk is that the event will not generate sufficient revenue to cover all expenses. That potential financial risk must be acknowledged and understood at the beginning of the process so that the decision makers are clear on the risks and potential benefits of hosting an event. In some cases, a hosting organization is willing to run at a “loss” financially if the event succeeds in promoting public awareness of the organization and/or increased cooperation between groups within the community.

# Choosing a Speaker

Having the right speaker (or speakers) to present your theme with a speech that makes most sense to your audience is the key to a successful day. People may complain about the small details such as the room temperature, the snacks, or delays in traffic but if they complain about your choice in speaker, then the day is ruined and, perhaps, your reputation as well.

Therefore your choice must be based on clear criteria:

1. Have you seen the speaker in action? If not, has anyone else in your organization?
2. Does the speaker have excellent references?
3. Is s/he an expert and leader in this field? If yes, are they used to speaking to the type of audience you expect? If the speaker is new to your field but considered an expert or outstanding speaker in another field, how could they still be suitable for your needs?
4. Is s/he represented by a speakers' bureau? If yes, you know that they have gone through some sort of screening process – speakers' bureaus get a commission on speaking fees (usually 25%) so they can ill afford to work with poor speakers. If no, do they have a sufficient track record to prove they are worth their fee?

Speakers come in various fee ranges.

## **Level 1 – \$250 honorarium to \$2,500 for a one-day workshop or keynote**

This is the most common group of speakers for workshops and conferences. They are often the presenters of concurrent conference sessions. They are experts in their field and may also be excellent speakers. Most professionals who speak as part of their work (e.g., physicians, lawyers, nurses, technical experts and scientists) fit into this category. Their income comes primarily from their work rather than from their speaking so they often speak for an honorarium.

## **Level 2 – between \$2,500 and \$10,000**

These are professional speakers who are also experts in a specific field. Most of their income comes from speaking and teaching rather than from their specific field. In this category would be people who used to work elsewhere and have become self-employed public speakers and content experts. They summarize work done in a specific field to keep their audiences current. You can expect that their presentations are more professional, easy to understand and based on solid adult learning principles. They may also be more informative, entertaining and motivating as speaking to audiences is what they do best.

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Note: For people new to presenting in public, my books: *How to Teach Others* and Chapter 4 of *Prescription Leadership*, may be helpful. They are available through the Legacies website: <http://www.legacies.ca>.

**Level 3 – between \$10,000 and \$25,000**

This is the group of speakers whose names are easily recognizable by people inside and out of a specific field. They might be entertainers, famous authors, athletes, retired senior executives, and motivational speakers. They likely have books, CDs, and other products to sell at their speeches. They get a lot of publicity and often draw a good crowd to their presentations.

**Level 4 – over \$25,000**

This is the elite in the speaking world. In this category would be the likes of retired U.S. Presidents, top earning entertainers, elite athletes, and executives of multinational corporations. They are often written about in books, are on magazine covers and appear on talk shows.

For our purposes in this book, we will assume that you want a level 2 speaker who is both a content expert and a professional speaker. This example goes beyond the typical of hiring someone locally who is not an experienced speaker and, therefore, this example will provide opportunities to explain more details of how to organize such an event. You want someone who can help fill a room with their name and reputation and someone who can deliver a keynote *or* one-day workshop that is energizing, enlightening, motivating and practical. You want your audience leaving the day asking for more. You want someone who has written or has audio/video material that can add value to their content.

Ideally, you will also want an out-of-town speaker who speaks on various topics to spread the cost of their travel and accommodation costs. For example, the speaker may be paid an additional fee to offer a public presentation before or after their one-day workshop. The speaker will likely give you a ‘deal’ since they are in town already and for a little extra work can earn extra money from a different audience. They may also have various topics quite distinct from their one-day workshop. They could do another workshop or presentation for a completely different audience.

How would multiple presentations help your organization? Imagine a speaker who can speak to a health care audience (professionals, volunteers, students, patients and families) on one day about how to provide more supportive care in the home and in health care facilities. In the evening he or she does a similar presentation for 60-90 minutes for the general public in the same venue. The next day, he does a one-day workshop on leadership development or financial planning or another topic very distinct from the first. This second workshop can also be put on by your organization, or you can link the speaker to another group in your community or region and share the transportation and accommodation costs between you.

A sample contract may be helpful for you to modify and get agreement with your speaker on the key points of their presentation for you. In Appendix 6 is the contract I use with my event planners.

## Speaker's Code of Conduct with You

Speakers should be aware that you have expectations of them beyond customizing their generic presentation for your specific audience.

Some simple expectations to pass along to them either in the contract or personally:

- provide photo and promotional material upon request
- provide a sample “introduction” upon request
- assist with promoting the event through advance or on site media interviews
- they need to be in the town/city the day before the event (to ensure they will be at the venue on time – minimizes delays due to transportation problems)
- they need to call you when they arrive in town so you don't worry the night before the event
- they need to show up to the venue one hour before the event and introduce themselves to you personally (sometimes, speakers might actually be in the venue having a cup of tea without you knowing they have arrived!)
- that you do not want them ‘selling’ their products during the presentation but that someone else (the person introducing or thanking them) will mention any products for sale after the presentation
- that they stay after their presentation to answer personal questions from the audience.

Some of these requests will not be possible in certain circumstances (e.g., arriving the night before, staying afterwards to answer questions) but you must be clear with the speaker of what is expected of them and repeat these expectations on your last contact with them before the event.

# Choosing a Venue

There are many different types of places where you can hold a workshop. What you choose will reflect both your position in the community and your budget. Here are some examples of venues:

## Typically

- Board room, lecture theater or similar room within your own organization
- Hotel/motel conference room
- Conference center
- College, university or high school
- Theater (film or stage)
- Faith community buildings (e.g., church, synagogue, temple)
- Community center
- Library

## Less typically

- Museum
- Art Gallery
- Town/city recreation center
- City/municipal hall
- Ship
- Shopping Mall
- Resort
- Business school
- High Tech Center
- Computer Training Center
- Apartment/Condo building recreation room
- Music School
- Institutional and corporate conference or board rooms (e.g., hospital, long-term care facility, town/city's leading manufacturer)

The earlier you book a place, the better. Many excellent venues are booked well into the next year. We will look at contract considerations shortly. But first, some questions to ask yourself. Remember, we are using the example of a one-day workshop. For conferences and larger events, you will need to be more detailed than the following list.

1. Is the venue available for the time that you want it?
2. Is the venue within your budget? Would moving it to a low season (often July, August and December for meetings) be helpful?

3. Is the venue close to the airport and train station for out-of-town speaker(s) and participants? If not, are there sufficient taxis or buses to get people to their hotel and venue? If not, can you arrange for enough volunteers to help people get to where they need to be?
4. Are both the venue and hotel facilities easily accessible for people with physical disabilities? If not, how can you ensure that participants with disabilities get to and from the venue easily and comfortably? Within the venue are all locations accessible for those with wheelchairs, walkers and mobility limitations – that is,
  - are there alternatives to stairs?
  - are the hallways wide enough?
  - are the meeting rooms easy to reach and move around in?
  - are the washrooms appropriately equipped?
  - are lunch venues accessible?
5. Is there ample parking at both the venue and hotel? If not, where else can people park? What costs should they expect?

**If people are staying in a hotel, find out:**

1. If the check-in process will be expedited for your participants.
2. If the hotel staff are cordial and helpful.
3. If people will get help with their luggage, if they need it.
4. What the typical ‘tipping’ guidelines are for the hotel.
5. If the rooms are comfortable, clean and affordable. There should be a corporate discount rate for event participants. Usually a block of rooms *is* set aside for a period so people can make their own reservations. After that time, participants will have to pay a higher room rate.
6. What amenities are nearby (e.g., shopping, restaurants, convenience store, all night drug store, theaters, cinemas)?
7. If the hallways and lobby are clean, spacious, safe and bug free.
8. If the rooms have smoke detectors and a sprinkler system.
9. If there is a place to lock away valuables in the hotel.
10. If there is a room deposit required and by when to confirm registrations.
11. If the hotel overbooks its rooms (i.e., rents out more than it has because some people cancel at the last minute) and if so, how to ensure rooms for your participants.
12. Who is responsible for any damage.
13. If there is a security force in the hotel at all times.
14. If room rates are guaranteed.
15. If the hotel will be undergoing any noisy renovations or other construction during the event. If so, is there a discount to participants?
16. If there are any expected management changes during the time of the event that might impact this contract.

**For your speaker, find out:**

Does the hotel have room service, an iron and ironing board in the room, free parking, laundry service for longer stays, recreational facilities, and restaurants nearby?

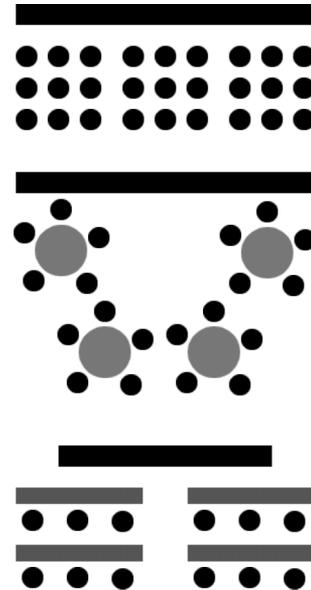
**At the venue, find out:**

1. If there is a comfortable area for registration and coat check service or convenient racks.
2. If you can hang banners in the registration area and inside the event room.
3. If there are large enough restrooms nearby.
4. If there are enough elevators and stairways nearby.
5. If all areas are accessible for people with physical disabilities.
6. If you can regulate the temperature of the registration and event rooms.
7. If the spaces are well lit and fresh smelling.
8. If there is adequate sound proofing from other rooms when the doors are shut.
9. If there are sufficient breakout rooms, if necessary.
10. If the rooms can be set up in a suitable style (e.g., theater, classroom, round tables) for the expected number of participants with a clear view of any screens used and a clear view of the speaker. Are there any impediments to a clear view (e.g., pillars, mirrors, and windows)?
11. If there is a way to block out light that may interfere with people's view of the speaker or screen.
12. If there are any pillars or similar obstructions that will prevent participants from a clear view of the speaker(s) and any visual aids (e.g., screens, flip charts).
13. What type of lighting does the room have and how does it work.
14. Who is the contact person for a/v needs and maintenance during the day.
15. Where the electrical plugs are and if there are enough.
16. If signs, flip charts and banners can be taped or pinned to the walls and doors.
17. How early can you set up before the event.
18. How quickly must you leave the venue in case another event is happening after yours.
19. If the venue provides any 'free' items such as pens, notepads and drinking water.
20. If there is a sound system in the room and who will operate it.
21. If there is a deposit required and by when.
22. Who is responsible for any damage.
23. If there is a security force in the hotel at all times.
24. If you have to pay for any insurance premiums.
25. What is the cancellation policy.
26. If menu prices are guaranteed.
27. If the venue will be undergoing any noisy renovations or other construction during the event. If so, is there a discount to participants.
28. If there are any expected management changes during the time of the event that might impact this contract.

29. View all of the above from the point of view of a participant with limited mobility. Is this person able to be a real part of the whole day?

### Costs

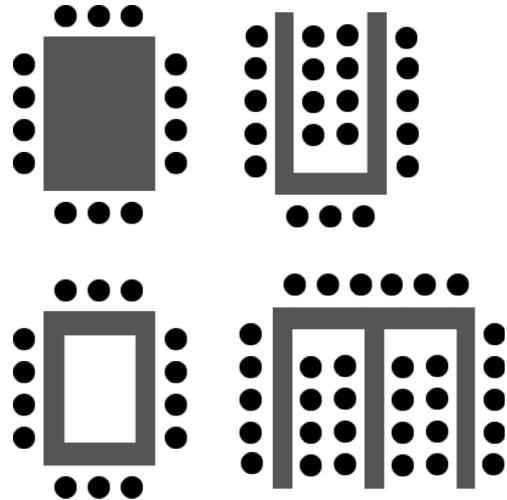
1. Negotiate a reduced fee for a block of hotel rooms for out-of-town participants.
2. Negotiate a detailed contract (no hidden costs) for:
  - Room set-up and clean-up
  - A podium or small stage
  - Audio-visual equipment rentals (if any costs)
  - Water jugs and glasses
  - Snack and drinks for break time
  - Cost per participant for lunch (if part of the workshop) or provide participants with alternative restaurants nearby
  - Cost of any taxes and gratuities
3. You may negotiate a free room(s) for event planners to stay the night before in order to ensure that everything is set early the next morning. This also gives you time to introduce yourself to out-of-town speaker(s) and participants.



### Venue Setup

Your speaker(s) may have a preferred layout style for the venue room. As a general rule, a room that can seat 100 people theater style can normally hold:

- 75 people in round tables or top table layout
- 50 people in classroom layout
- 25 people in a boardroom or U-shape
- 50 people in theater style with lunch



# Choosing the Audio Visual Equipment

There are many audio-visual tools that may help with your event. Some venues provide this equipment for free while others have a fee for each. It is important that you know exactly what your speaker(s) want in advance so that you have enough time to reserve the equipment. Let your speaker(s) know you that you cannot make last minute changes to the equipment list.

The following are some of the typical audio-visual equipment needs:

## Microphones

1. Lapel microphones (I prefer these for maximum flexibility in moving around the room)
2. Lectern microphones
3. Musical instrument microphones (e.g., if you are playing guitar and singing)
4. Audience microphones or table microphones for panel discussions

## Flip Charts

1. Sufficient stands/easels and pads of paper
2. Masking tape or pins to attach any to walls if necessary (and allowable at that venue)

**Overhead Projector** – although ‘old fashioned’ these projectors rarely break down, don’t involve much technology that can fail and permit the room lights to be turned up normally so that participants aren’t spending the day in a dimly lit room.

1. Projector
2. Extension cords
3. Spare bulbs
4. Stand with room for overheads

## Slides/Films/computer shows (e.g., PowerPoint Presentations)

1. Appropriate projector (e.g., LCD for computer projection)
2. Extension cords
3. Spare bulbs
4. (Most often, speakers bring their own laptop computers but some may request to use a laptop at the venue)

## Audiotape/CD

1. Player (either portable or in larger venues they have built in systems)
2. Extension cords

**DVD/VCR**

1. Player (either portable or in larger venues they have built in systems)]
2. TV monitor or large screen
3. Extension cords
4. Spare bulbs

**Other Items**

1. A laser pointer for the speaker to point out something on the screen.
2. It is helpful to have extra-wide masking tape or duct tape to cover extension cords so people do not slip.
3. Extra markers, overhead projector pens, pads of paper, etc. to accompany any of the audio-visual machinery.
4. Signs for directions to event registration and room(s) including easels

**It is unlikely for a one-day workshop that you will need the more expensive items such as:**

1. Large screens (like at rock concerts or political rallies) so large audiences can see the person speaking better
2. Recording devices like audio or video cameras to record the one-day event.
3. Strobe or spot lights
4. Special stage designs or platforms
5. Dry ice machines for mist/smoke

**NOTE 1:** You need to decide whether to record the event and if so, what kind of recording, i.e., video, audio, still photographs or transcription. You may need to rent this equipment as part of your a/v package.

**NOTE 2:** You will need to decide how to adapt and enhance you're a/v needs to meet the needs of any audience members with special requirements. For example, will your audience need:

- simultaneous translation
- sign interpretation
- special seating for those with visual or hearing impairments
- the speaker talking somewhat slower to be better heard and understood
- extra seating for any attendant support they have with them
- access to an electrical plug for those recording the event and/or using a computer?

# Marketing the Event

Raising public awareness of any product, service or organization is always easier around a specific event. Use this event to get in touch with your local media, allied organizations in the community and region and your own clients/customers.

Begin immediately by collecting press releases, flyers, brochures, posters, and registration forms that you think are well done. They can help you design your own materials and help to ensure that you do not miss important information. If you have a communications or public relations/media department, ask them for help.

## Local Media

It is always a good idea to keep in regular touch with the journalists/broadcasters most likely to report on your organization. If you already have that kind of rapport, then promoting this specific event will be easy.

If you have not been in regular touch with the local media, then this event is the perfect opportunity to begin that process. Begin by finding out the names of the journalists most likely to report on your event. For radio and television, it is the program's producers that need to be reached first.

Begin with a telephone call and ask permission to send in a press release as a follow-up. Let them know that the speaker(s) and event planners (you!) are available for interviews before and at the event. Call a few days before to remind them and invite them to share in one of the breaks or lunch (like the rest of us – they love free food!).

The best time to approach various media outlets will depend on their size and the size of their area. Check with your own contacts. For example, in some areas the newspapers only need a week or so to decide whether to send a journalist and/or photographer to an event. For radio and television, they may require a longer notice with the understanding that if a better 'story' comes up, your event will likely be 'bumped.'

## A Press Release

A press release is simply a tool to get someone interested enough to follow up with a telephone call to you to ask for more information. Like a job resume, you should keep it short with enough information to answer the questions:

- Is this event important to our readers/viewers?
- Does it fit in with our production schedule?
- Is the speaker(s) interesting enough to assign a reporter/producer to interview them?
- Is this group worthy of some community 'good will' reporting?
- Is there a deeper story here that will interest an even broader readership/viewers that the event planners don't know about?
- Can this story or a working relationship with this group help my career?

If they answer yes to one or more of these questions, then you will likely get a story. Once you build a rapport with them, it will become easier to help them report on your services and organization in the future. If you can help them find 'a good story,' they will be grateful.

To make their life even easier, you can draft a short article as part of the press release or separately so that a journalist or copy editor can revise it only slightly and print it when they have extra space in the paper. Attach a high quality photo to save them the expense of sending out a reporter. If nothing else, the story and photo may be an extra incentive for them to send out their own reporter and photographer.

Include the sponsors' logo and name on press release, if they want that. It is a small thing for some genuine return to your sponsors.

See Appendix 8 for a sample press release.

## Flyers and Posters

Use the in-house expertise of your organization's communications or public relations department if you have one. Otherwise, flyers or posters can be done economically by asking someone in your organization with a creative flare or a local school's art department to create one for you. Another possibility, when you have more time, is to create a public 'contest' to create a stunning piece of art work for your event.

Determine:

- where posters will go,
- how large they need to be (i.e., cost of a 4-color, 14x7 poster is quite different from a

letter-sized photocopy on coloured paper)

- how many copies you will need (plus extras)
- who will design it and at what cost
- who has final approval over the art work without having to pay full price if the design is not acceptable.
- who will distribute before the event
- who will collect them afterwards.

With a high quality master copy, a local copy shop may give you a discount or donation to produce the flyers or posters. These can then be delivered through the post office or by volunteers to local businesses, libraries, faith communities, grocery stores, etc. for prominent placement. Have volunteers go back regularly to replenish supplies and to ensure that the posters haven't been taken down too early. Once the event is over, make sure to go back to all these places and remove the posters and collect any extra fliers and to thank the people there. This gesture will help enormously the next time you promote an event.

Flyers and posters need to 'grab' people's attention in an appropriate, positive way. They are less detailed than brochures and are only designed to get people to call and ask for more information. They should always include:

- What is happening
- Why – the benefits that participants will receive during and after this event
- Who is putting the event on with their name and logo
- Where (include map if necessary)
- When
- How people can get more information (give your contact name, telephone number and e-mail/web site)
- Sponsors' logo and name
- Accessibility information (re: physical accessibility, signs, childcare, handout materials, etc.)

For example:

**Who will care for  
your loved ones as they  
get older or ill?**

**Listen to Canada's leading author  
talk about your options and  
how you can make a life-defining  
difference to the ones you love.**

**Presented by:  
(your name)**

**Date  
Place  
Time**

**For more information, contact:**

## Brochures

Brochures (including a registration form or a separate form) are sent to those people most likely to register for the event.

The brochure is more detailed than a flyer or poster and should give:

- What is happening
- Who should attend
- Why – the benefits that participants will receive during and after this event
- Who is putting the event on including any registration or business numbers, charitable numbers, name and logo
- Who are the speakers and why they are worth hearing
- Information on the content of the one-day workshop (perhaps even a schedule for the day)
- Where (include map if necessary)
- Hotel accommodation information, directions and contact telephone number and e-mail
- When
- Cost and what the fee includes
- Payment details
- Special terms and conditions re: cancellations, discounts, multiple person registration discounts, discount rates for those from allied groups working on the same event together,
- How to register
- How people can get more information (give your contact name, telephone number and e-mail/web site)
- Disclaimer similar to: “The organizers reserve the right to make such changes to the program and speakers as is necessary due to conditions beyond our control”
- Sponsors’ name and logo.
- Accessibility information (e.g., available on request, childcare, assistance, etc.).

## Registration Forms

There are four types of registration: mail in, phone in registration, e-mail/internet and at the event.

At a minimum, the form should include:

- Person's name
- Title
- Full address
- Telephone numbers
- E-mail address
- Payment details (e.g., check, credit card, invoice to organization)
- Sponsors name and logo.

### Advance Registration

- Collect registration forms from other one-day workshops and conferences that you attend. They will make good models for what you need to include.
- Only ask for information you need. This is not a good time to do surveys or collect other information. People do not like filling in forms, so make your form simple and easy to fill out.
- If possible, consider an online registration so that people can type in their information (faster for most people these days).
- If they need to use a paper form, ask them to **print** their answers.
- Use the same type font for most of the text. Switching between fonts to be 'creative' is only distracting for most people.
- Where possible, use check-off boxes or "circle the correct answer" to avoid them have to write.
- Include any incentive to register early on the form. It is not enough to include it in the brochure since they may not register immediately. On the registration form give the cut-off date: "This pre-registration offer ends on *date*."
- Let them know what is included with the registration fee. For example, - breakfast and lunch, handout materials, break snacks and drinks, and any 'gifts' donated for the event.
- Tell them "Do Not Send Cash. Make Check or Money Order Payable To:" Indicate that money will be deposited immediately and no postdated checks will be accepted.
- If you accept credit cards, indicate which ones (use their logos) and ask for their credit card number, their expiry date and the name on the card.
- Space for people to request any accommodation for their personal needs. For example, child care, accessible washrooms, specific dietary request (vegetarian or kosher meal), seating near the front to better see the overhead projections.

- End the form with the contact person, telephone number and e-mail to answer the registrant's questions.

Once you receive a registration form and it is correctly filled out with the required fee, send a confirmation letter or e-mail. You can include any program changes, information about accommodations for out of town registrants, or reminders that you like. If there were any errors on either the form or in the fee, add that to the letter. Include their receipt for the fees. If it is too close to the event, bring their receipt with you to include in their handout material.

Some organizations will only pay for a conference/workshop fee after receiving an invoice. You may need to set up an accounting system procedure to make that possible. Try to make it a fast turn-around time to avoid late or cancelled registrations. The registrant is rarely at fault for slow payment from a large organization so you may need to include some leeway in collecting fees after the one-day event to accommodate those registrants.

### **Onsite Registration**

The form for onsite registration can be the same or a simplified version to make it easy to register. People remember how easy or difficult it was to register for an event. This is a major deciding factor in how they evaluate the overall day but also of whether or not they will come back to another event hosted by the same organization.

The registration process, therefore, provides an opportunity for registrants to feel genuinely welcomed to the event as well as the time to fulfill your paper work. Have plenty of people available to register, direct traffic and solve problems as they arise. There is nothing worse for registrants than having a concern or problem and not knowing who/what is being done about it.

For registrations, organize them either:

1. alphabetically
2. by region/geographically
3. by employer/organization.

Determine if you will assign seating (ask the speaker if this would be helpful – for example, ensuring that people from the same agency are divided equally in the room so they can meet and network with new colleagues). If you have assigned seating, ensure you have signs on the tables so people can find their seats easily.

## Choosing a Menu

If you can raise enough revenues (added to the registration fee or through sponsorship) it helps to have a catered breakfast and lunch for a one-day workshop. In this way, the participants stay together in one place and have an opportunity to network with new people. If they go away to eat, it is likely they will only go with people they already know. There is a great deal of networking that goes on around a morning muffin and fruit or in a buffet lunch line-up, at the table, around the rest rooms and outside the venue in good weather. Ensure that smokers have a suitable place to smoke and that they feel just as welcomed as everyone else.

For a menu, it is often easier to have a buffet breakfast and lunch (i.e., fewer waiting staff needed). In today's climate it is best to have an array of food that will meet the dietary needs of most people.

For lunches, many groups now have prepared sandwiches with fruit and dessert trays. Some also add soups and salads. Be prepared to include a variety of foods so that everyone feels satisfied. For example, have vegetarian foods, food for people with diabetes, culturally sensitive foods (e.g., not all beef or pork meat – but a variety including Halal and kosher meats).

The overall choices are determined by timing (hot meals must be served on time) and your budget. Often a buffet meal at a hotel or conference center ranges in price from \$15 - \$25 per person. A sit-down lunch can be considerably more expensive. If you include snack foods and drinks during the morning and afternoon breaks into the lunch package, the cost may be less. Negotiate the cost of food in with the room rental. For example, many hotels will not offer to reduce costs for you but if you ask for a free meeting room in exchange for a full lunch at \$20 per person for an expected audience of 100, they will usually agree. You will have to negotiate a final date and time to confirm how many lunches you will require and confirm the final costs at that time so there are no surprises. Include all taxes and gratuities for serving staff in the contract.

In some community venues it may be possible to hire a small catering company to provide your meals and snacks. As well, in some venues and consistent with the theme for the day, it may be suitable for people to bring their own lunch to eat at the venue. Given many people's emphasis on conserving both money and the environment, there is much less wastage when people bring their own meals.

If the group is a well-defined one (e.g., from the same organization) you can also have a "pot luck" lunch where people bring favorite dishes to share with colleagues. These can be enormously fun as people get to exchange recipes, share stories and get to know each other in a different way.

# Final Preparations

**Two weeks before the workshop**, send the speaker(s) detail information that includes:

1. Information on their flight (if you scheduled it) and their room accommodations.
2. The names of people, if any, meeting them at the airport, train station or hotel to welcome them.
3. Contact information for them when they arrive (your telephone numbers at work and home; the hotel's telephone number, a cab company you recommend, telephone number at the venue).
4. Expected time for them to show up at the venue and directions to it if not at the same location as their accommodations.
5. Any program changes that affect the speaker(s).
6. Number of registrants.
7. The names of any other speakers and guests at the event so the speaker is aware of their names before any introductions are made – helps them remember people's names and who they are.
8. The names of any people sharing a head table or lunch table with the speaker.
9. A copy of the programs and agenda.

**During the last week** before the event, there are things that must be done:

1. Confirm all travel and hotel arrangements for your speaker(s) and out-of-town participants.
2. Go over your specific expectations with the speaker regarding: when they need to arrive at the venue, how to contact you, not to “sell” their products during the presentations, how you can help sell their products afterwards, and how long you expect them to stay and answer questions from the participants.
3. Confirm the venue's booking, menu, room set up, contact person's name for a/v requirements and room problems during the day.
4. Call the speaker to confirm they received your package last week, to confirm their availability for the event and to answer their last minute questions (usually about the number of registrants, directions to the venue). Even though their questions were probably answered in some of the information you sent them originally or last week, they are likely involved in many events and forget specific details quite easily.
5. Prepare the handout packages for the participants. This often involves combining the handout material with the free ‘gifts’ by sponsors and the venue (notepads, pens) plus the agenda/program for the day, name badges, evaluation form, information on the organization putting on the event, a greeting from the mayor and other politicians (if suit-

able for the day), content material from the speaker(s), participants' contact list, venue site plan, tourist information (if appropriate for type of event), exhibitors' contact, sponsors's contact list, etc.

6. Name badges that hang around the neck are easiest as they do not damage clothing (like stick-on badges). The badge can include first name in larger letters, last name, job title, organization's name where they work. The badge should be checked against the registration form. Have blank badges available to make corrections on site. The badge may include a logo of the workshop title and/or your organization's name as host.
7. Ensure you have extra registration forms for last minute registrants.
8. Ensure you have receipt forms (in duplicate) for new registrants as well as receipts for those who pre-paid.
9. If you decided to record the sessions, you will need to have the necessary equipment (video recorder, audio recorder, and/or camera for still photography).
10. Prepare draft 'scripts' for:

**Event Chair**

- Welcome
- Housekeeping (e.g., where restrooms are, introduce co-ordinator for the day who will answer any questions, lunch and break times)
- Thank the sponsors and exhibitors
- Info on any draws or contests for the day
- Where smoking area is

**Those introducing and thanking the speaker(s).**

- Your speaker(s) may well have a basic introduction script prepared for their clients that you can modify to suit the occasion.
- Thanking the speaker usually includes a 30-second or less personal highlight or summary of the presentation.

11. You will need to know how to deal with:

- Refunds
- Lost badges, programs, etc.
- "Lost" registrations
- On site registrants who want to attend on "credit" (i.e., pay later)
- Pre-registered participants who still owe money
- Handling cash and checks on site and where to put it until it can be deposited – the venue may have a safe on site that you can use.
- Theft of any items
- Injuries or medical emergencies (have first aid kit plus contact information for local ambulance/paramedic services)
- Complaints about venue, food, speaker(s)

12. Have enough:
  - pens and pencils,
  - paper,
  - staplers and staples, staple removers,
  - (cellophane and duct) tape,
  - scissors, glue,
  - paper clips,
  - calculator,
  - blank name badges,
  - ribbons to identify speakers, workshop organizers, sponsors,
  - extra programs for the registration table at the event.
13. Ensure that you have an up-to-date registrants' list.
14. Ensure that you have extra copies of the handout packages for last-minute registrants.
15. Ensure you have cell phones for each of the planners and that they have sufficient battery life for the day.
16. Make contact with the venue for any last minute changes, decisions, or requests.
17. Assign someone, or do it yourself, to welcome the speaker personally upon their arrival. If they have traveled in from out-of-town, it may be helpful to meet them at the airport or hotel or to have a note waiting for them at the hotel from you.
18. Assign someone, or do it yourself, to prepare and give the introduction to the speaker at the event. This person can also do any "housekeeping" announcements. Make sure they understand the importance of staying on schedule.
19. Prepare signs (or have the venue do it) showing people:
  - where to go as they enter the building at the different doorways
  - which way to go at stairways, end of hallways and at elevators,
  - outside the venue room(s)
  - if you have assigned people to certain tables, prepare table markers (either a number or name on a table stand) so people can find their assigned seats.
20. Assign someone to thank the speaker at the end of the event (if different from the person who introduced them). You may decide to give the speaker(s) a memento of the community as a gift so that will need to be on hand for the event.
21. Prepare a final check for the speaker(s) to cover the remainder of their fee. If you need an invoice, ask the speaker to e-mail or fax it to you immediately so they can be paid on time according to the speaker's contract.
22. Send out reminder e-mails (or call, if necessary) to registrants with directions to the venue, the starting and finishing times and an offer for last minute discounts to any of their colleagues, family and friends.
23. Designate "helpers" whom are visible to the participants throughout the day to help with questions, information and emergencies.

Lastly, make sure you have as much rest as you possibly can before the event so that you are relatively calm and relaxed and in control of all the last minute things that happen on the day of the event. It won't go perfectly, but if you have followed most of the steps to now, it will certainly go very smoothly from the perspective of the participants (who rarely know how much effort it takes to put on a good event!).

# Day of the Event

There are several things to do on the day of the event.

1. Arrive early to set up the registration table and to make sure that the room is set up properly. Make sure there is a natural traffic flow so that people can easily stop to register or collect handout materials and move on to breakfast, snacks or their seat.
2. *If a lot of people are expected*, have two registration tables: (1) for those who pre-registered and just need their handout package, (2) those who need to register.
3. Introduce yourself to the audio-visual (a/v) technician on call during the day and test all audio-visual equipment and any sound system. If the a/v technician is not staying for the day, assign a volunteer to work with the technician to work out typical problems with the system so that the volunteer can meet the speaker(s) needs during the day.
4. Find out where the lights and temperature controls are and assign a volunteer to ensure that any changes to the lights and temperature during the day are done well. It is amazing how much is wasted during many events while people try to search out the lights and then figure out how to use them.
5. If you have help, ensure that everyone knows their tasks and has the tools and materials needed to fulfill their task.
6. Have a 'greeter' beyond someone at the registration desk. When people first arrive, they don't know where to go, don't know how to get rid of their coat, don't know where the restrooms are, where to sit, don't know other participants, etc. The more you can do to welcome them, the greater their enjoyment of the day. Like visitors to your home, the more personal the welcome, the more pleasant the visit.
7. Place sufficient signs around the venue so people can find the rooms easily.
8. If there is a complementary breakfast, ensure that it is well laid out and in time for early arrivals. The people from farthest away are usually the first to arrive and they have often not had anything to eat.
9. Have the speaker(s)'s greeter on standby as you are not sure when they will arrive. This person will then escort the speaker(s) to the room, help them set up, show them where the restrooms are, introduce them to the people helping with sound, lights, and the a/v

equipment. They should be the speaker(s)'s assistant for the day to ensure that everything they need is available to make the day go as smoothly for them as possible.

10. If you are the only event planner for the day (as opposed to a committee member), then you need to be readily accessible to everyone else (those helping and those participating). It is best to stay near the registration table or in the event room.
11. During the day, as decisions need to be made about when to break, how to stop the speaker(s) for lunch, etc., you need to be readily available as well. Things may go wrong with the a/v equipment and you will need to find the technician. The food may be late for lunch and you can ask the speaker to go a bit longer. The room temperature will likely need to be changed from the cool of the morning to the heat of the day.
12. At the end of the event, someone will need to thank the speaker and present them with a gift (if appropriate).
13. Make sure that participants are asked to fill out their evaluations before leaving (people rarely send them in afterward). As an incentive, give each a 'parting' gift of a donated item from one of the sponsors in exchange for the evaluation form.
14. After the event, pay the speakers the remainder of their fee and pass along any general feedback you have heard from the participants.
15. Once everything is cleaned up, the speaker(s) and participants have left, take a moment with those who have helped out to say "thank you" and to celebrate in some small way. You have pulled off a successful event with their help and you all deserve to feel good about that. Most often, people just shuffle off home exhausted and relieved that the day went well. People should leave more excited than that!

# Event Evaluation

It is important to evaluate the success and difficulties of any event you offer. The evaluation can help you maintain those aspects of the event that went very well while improving those other areas that were less successful. Few participants will find everything perfect. It's virtually impossible to successfully meet everyone's needs. Each participant has their own learning needs which can rarely be met within one event for everyone. What you learn from evaluations is what a majority of the participants saw as the benefits and weaknesses of your program. **Like all skills, one aims to be an effective planner; not a perfect one.** Perfection is impossible, but striving for constant improvement is not.

You must answer some basic questions before you can design an evaluation method.

## Design Questions

1. For whom is information being collected? Who will be involved in the decision-making process?
2. When should you evaluate? (Generally at end of session with a possible follow-up 3-6 months later.) When should *you* not? (When information cannot be easily collected or will not be used to change program.)
3. How should information be collected?
4. Will speakers/presenters be given a copy of the evaluation for their own benefit?

Once you have the background answers to those questions, you can decide what kind of evaluation method would be best. You may decide to combine various methods to get the most accurate evaluation you can. Keep in mind how much time you will have to design, implement and review your evaluation information and how that information will be used. For example, do not spend weeks working on this evaluation if the information will not be seriously used to improve your next event.

## Things to Evaluate

There are different things one can evaluate to improve programs. Most of them involve a participant's learning but others involve specific aspects of the training program including some of the following. A trainer can use the evaluation process to determine how effective some of these training aspects were and revise them according to needs.

1. Preparation of materials and participants,
2. Content,
3. The speakers/presenters,
4. Written and visual materials,
5. Activities: group and individual,
6. Time limits sufficient and met,
7. Participation of learners throughout event,
8. Environment helpful to learning,
9. Performance results,
10. Learner self-evaluations. Learners can evaluate:
  - if their original concerns or learning needs were met,
  - if their participation helped or hurt the learning process for themselves and for others,
  - what actions they are going to take to apply what they have learned.
11. Event planning process: registration, timely information, process before the event and on site.
12. Accessibility of the rooms, lunch venues, washrooms, etc. Although you did a preview of the venue before the event, issues may arise for which you did not plan.

## Evaluation Forms

Forms can be very simple or quite detailed depending on what you intend to do with the results. The more detailed the form the more you should use the information to improve the design and the delivery of the program. **Participants often are not too keen to fill in evaluation forms so use them only when you intend to use the feedback to improve your programs.**

In appendix 12 and 13 are several examples of evaluation forms.

# Finalizing Expenses and Budget

Once the relief of having a successful event is over, it is time to pay off the remaining bills and finalize the budget. You will likely have to pass along a report to your organization of the costs and revenues of hosting the event.

You may also choose to give an abbreviated version of the report to your sponsors to show them the difference their support made to the event and to funds raised. Sending out this kind of report quickly to the sponsors after the event while it is still fresh in their memory (within a week) is a great way to encourage an ongoing relationship with them for future sponsorship opportunities. In smaller communities, this may reward you even more as many of the organizations get asked a lot for sponsorship. When you go to them again in the future, they will remember how well you treated them as compared to others.

Prompt payment of outstanding invoices and bills reflect very well on you and your organization. Vendors remember who treated them with courtesy, professionalism and promptness in paying their bills. This is especially true of any vendors who provided a discount in support of the event. Prompt payment is particularly important in smaller communities where people know each other. Sometimes this familiarity leads to payments being made more slowly (“Jack is okay – he’s in no hurry”), which may hurt your chances of getting help from these vendors in the future. When you never take people for granted, you set an outstanding example of how community events can succeed.

# Final Meeting

Once the final budget is completed, it may be helpful to have a final meeting with all those involved in the event. At this meeting you can go over everything that went well and those things that could have been done differently. Get their input. It is important to focus on the successful aspects of the event and to acknowledge the efforts of everyone involved. Reward excellence in a way that reflects well on you and the recipient. If performance reviews are done in your organization, then make sure that a letter of thanks is included in their personnel file.

This type of meeting can also lead to further ideas about future events and who might volunteer to coordinate the organizing of such an event. Building upon success is always easier than starting from scratch. Offer to mentor anyone interested in acquiring the skills involved in event planning. These are highly transferable and highly valuable skills (i.e., can be used in almost any job or volunteer situation).

## The Party!

Whether as part of the final meeting or later, it is important to celebrate the success of the event with a celebration. It can be a potluck lunch, an evening out together, bringing in a local school band to play for everyone during lunch, etc. There are no limits to the creative ways people can come up with to celebrate a job well done when they are encouraged to do so.

It is a lot easier to recruit volunteers for the next event when the volunteers from this event are toasted and treated with admiration and gratitude for everything they have done. It is a wonderful way to end a process that began months before.

# Resources

Although most of the information in this book is based on personal experiences of the author over a 30-year period, the following references may well add helpful information for your own planning purposes. They are only a few of the many useful resources that you can find in your local libraries, in your local book stores or organization's library. On the Internet, do a search using key words like "event planning" or "meeting planning" to find current resources. Also keep in mind how much you can learn from experts in the field, including people within your own organization who have previously planned events.

Gilgen, Read. (1997). Conference planning guidelines for the International Association for Language Learning Technology. *Internet source accessed July 10, 2005: <http://iallt.org/confplan.html>*

O'Connor, Robin. (1994). *The complete conference organiser's handbook*. London: Judy Piatkus (Publishers) Ltd.

Migliore, David E. (2004). *Conference planning guide*. Columbus, OH: U.S. Department of Justice, Office for Victims of Crime; internet sourced July 10, 2005: <http://www.ojp.usdoj.gov/ovc/publications/infores/res/configuid/welcome.html>

Seekings, David with Farrer, John. (1999). *How to organize effective conferences and meetings, 7th edition*. London: Kogan Page.

van Bommel, Harry. (1995). *Take care of business*. Toronto: PSD Consultants. Includes chapter on planning and running effective meetings.

van Bommel, Harry. (1995). *Take care in speaking and writing*. Toronto: PSD Consultants. Includes chapters on presentations and public speaking and verbal communications in general.

van Bommel, Harry. (1994). *How to teach others*. Toronto: Legacies. A 'train-the-trainer' manual to help adults design, deliver and evaluate their training programs.

# Appendices

You can go overboard with charts, tables and checklist. Then again, if you don't have some way to track what is happening, you will forget important details that will frustrate you later on. Adapt the appendices for your own purposes and make sure everyone has copies who needs them to do their assigned tasks.

If it is practical, make sure that everyone has written instructions about what they need to do for the event to be successful. These appendices and instructions can then be reworked to be even more effective for your next event.

1. Event Planning Chart
2. Sample Time Line Form
3. Sample Budget
4. Speech/Presentation Checklist for Coordinator
5. Speech/Presentation Checklist for Presenters
6. Sample Speaker's Contract
7. Site/Venue Checklist
8. Sample Press Release
9. Final Preparations
10. Day of Event Checklist
11. Program Requirements
12. Evaluation Form: A Simple Version
13. Evaluation Form: A Detailed Version

## Appendix 1: Event Planning Chart

Standard Action Planning requires that you keep track of who is doing what and by when. Use the following to keep track of the overall project and use other appendices for specific aspects of the event planning process.

√	Item	Who will do the work	By when?	Comments?
	One planner or committee chosen			
	Person in charge of volunteer/staff for the event chosen			
	Time line created			
	Purpose chosen			
	Audience defined			
	Type of event decided			
	Theme chosen			
	Work with other organizations?			
	Sponsorships			
	Preliminary budget			
	Speaker(s) chosen			
	Venue chosen			
	Audio-visual chosen			
	Press release written and sent			
	Flyers and/or posters created and distributed			
	Brochures created and distributed			
	Registration form created and distributed			
	Menu chosen (if any)			
	Final preparations completed			
	Event day supplies prepared			
	Brief end of event day recognition for all people involved in planning and actual event			
	Evaluation			
	Pay off all invoices and expenses			
	Finalize budget and prepare report			
	Final meeting with planning group and a celebration party			

## Appendix 2: Sample Time Line Form

The size and complexity of your event will determine how much time you should spend on preparing for it. A meeting of 10 people, for example, may take only a few hours to organize a few weeks or month before the event. A one-day workshop with out-of-town speaker(s) and participants can take between 2-6 months, depending on how many people can help you. A large conference can easily take 12-15 months to organize.

Here is a sample 3-month timeline for a one-day workshop event. As with the **Action Plan Chart**, check off items as they are accomplished and make sure everyone involved in the planning process has a copy of the chart.

√ Task	Time Line
Decide on one planner or a planning committee (and who will head the committee)	Month 1
Decide on type of event and theme	Month 1
Decide on whether to work with other community groups or organizations	Month 1
Decide on whether or not to look for sponsors for event	Month 1
Decide on budget (prospective revenues and expenses)	Month 1
Decide on speaker(s)	Month 1
Decide on venue (place to hold event)	Month 1
Reserve travel and accommodation for speaker(s) and block of rooms for participants	Month 2
Marketing event to other groups, media, public including brochures, registration forms, e-mail lists	Month 2
Choosing a menu (if any) for event including snack breaks	Months 2 & 3
Choosing audio-visual needs for meeting	Months 2 & 3
Follow-up marketing and local media contacts	Month 3
Prepare workshop materials, handouts, registration table items (extra forms, pens, name tags, markers, tape, stapler, contact and participants' lists, etc.	Month 3 and day of event
Paying speakers' fee, accommodation costs, venue rental, a/v rentals, and other expenses	Month 3 and after event
Event evaluations	Day of event and summarize after event
Finalize budget	After the event
Final meeting to review overall process and make recommendations for similar events in the future including revisions to all forms, charts and checklists used.	After the event
A party or similarly suitable recognition for all the hard work put into a successful event!	After the event.



## **Appendix 4: Speech/Presentation Checklist for Coordinator**

Speaker's Name \_\_\_\_\_  
Date of Contact \_\_\_\_\_  
Contact Info (telephone, email) \_\_\_\_\_  
Agree Upon Fee \_\_\_\_\_  
Date, Time & Length of presentation \_\_\_\_\_

**Audio-visual requirements:** (check boxes that apply)

- microphone(s),  flip charts,  overhead projector,  slides/films/computer shows,
- audiotape/CD,  DVD/VCR

**The content event planners want covered in presentation?** (use back of form if necessary)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Contract-Invoice**

\_\_\_\_\_  
Sent &Returned? \_\_\_\_\_  
Fee & Expenses Paid when? \_\_\_\_\_  
Speaker's Photo Sent? \_\_\_\_\_  
Speaker's Bio Sent? \_\_\_\_\_  
Handout Master Sent? \_\_\_\_\_  
Transportation Booked & Paid? \_\_\_\_\_  
Accommodation Booked? \_\_\_\_\_  
Health Insurance Booked? \_\_\_\_\_  
Contact Summaries: \_\_\_\_\_

<b>Date</b>	<b>Discussions</b>
_____	_____
_____	_____
_____	_____
_____	_____

Use blank sheet if needed.



**LOCAL Presentations** (check off to ensure you have everything you need for your presentation(s):

- Speech, Agenda/Schedule
- Overheads/Computer
- audio/video tapes for during presentation
- handout material if bringing your own
- Business Cards
- Promotional Materials
- Calendar/Appointment Book
- "Thank You" gift for organizers
- Books/Products for Sale
- Credit Card Machine
- Order forms for products
- Give-away gifts for participants
- Guitar/musical instrument
- Comb/Brush
- masking tape for overhead projector
- extra markers, pens, pencils, blank overheads, etc.
- ID: driver's licence, citizenship, credit cards
- money (bills & coins)
- glasses, contact lens, eye drops/solutions

**AWAY TRIPS** (check off to ensure you have everything you need for your presentation(s):

- Everything in table above
- ID (Passport, citizenship, Country's travel visa)
- airline/train/bus tickets
- medication(s)
- clothes for presentation
- other clothes: underwear, socks, shirts/blouses, pants/skirts, ties/neckwear, belts, jacket, shoes (dress and for comfort), slippers, T-shirt, nightwear
- winter clothes: coat, sweater, gloves, scarf, boots, hat
- thread kit, travel iron/hair dryer,
- toiletries: tooth brush & paste, floss, deodorant, makeup, scissors, band-aids, shampoo, etc.

**For your family leave information on:**

- Where you will be – location, telephone number & contact person
- Travel Information: dates, flights/trips, departure/arrivals, contact numbers (if any)

## Appendix 6: Sample Speaker's Contract

This contract is written in the spirit of having both parties to the agreement understand their mutual responsibilities to provide the most successful presentation possible to the attending audience.

This contract is made as of the ??th day of **Month, year** between Harry van Bommel (the Speaker) and **Organization Name**.

### Harry van Bommel:

1. Agrees to present on the following TITLE OR TOPIC: **The Gift of Care**
2. Agrees to the following FORMAT: **One-Day Workshop**.
3. Agrees to the following estimated size of audience: **100-300 people**.
4. Agrees to the following DATE: **November 22**
5. Agrees to the following TIME: **0900-1630**.
6. Agrees to the following LOCATION: **Name of Venue**.
7. Agrees to participate in the publicity of the presentation by submitting biographical material and a photograph upon request. Any publicity can only begin after this contract has been signed by Harry van Bommel and your organization.
8. If you wish, Mr. van Bommel will meet the media for interviews when scheduling permits.

N.B. If Mr. van Bommel cannot fulfil this contracted presentation because of sickness or accident, transportation delay or interruption, labour difficulties, strikes or any other cause beyond his control, then he will not be liable to your organization for failure to perform nor will he be entitled to any portion of the agreed upon fee, and there shall be no claim for damages or otherwise by either Mr. van Bommel or your organization against each other. Mr. van Bommel agrees to notify your organization of any difficulties in meeting his performance as soon as possible to permit alternative planning (when possible).

### Your organization:

1. Agrees to the FEE of **=\$4000** including GST (6%). Your organization will forward 50% of this investment upon confirming the date of the presentation to Legacies Inc. or **\$2000**. The remaining investment of **\$2000** is **payable to Legacies Inc., on the day of the presentation.**
2. Agrees to the following TRAVEL, LODGING & GROUND TRANSPORTATION ARRANGEMENTS: Your organization agrees to reimburse Mr. van Bommel reasonable air transportation costs to and from the speaking engagement(s). Reimbursement must be paid within 5 working days upon receiving confirmed flight information.  
Your organization agrees to arrange reasonable food and lodging (**non-smoking room**) for the length of Mr. van Bommel's stay and to cover any ground transportation costs (e.g. taxis to and from the airport, taxi to the speaking engagement).
3. Agrees to provide a suitable location for the presentation with the following, specific items:
  - overhead projector

- cassette player for audio cassettes,
  - portable microphone
  - Television/Video screen and DVD player
  - sufficient photocopies of materials for each participant (original copies provided by Harry van Bommel).
4. Agrees to have the room set-up in the following way:  
**Whatever is suitable for the size of the audience and the specific room. People must be able to see the overhead projector screen and television screen.**
  5. Agrees to assume all responsibility for making sure that any required provincial or local taxes related to the presentation by the speaker, and/or the event as a whole, are paid.
  6. Agrees to get any required licenses and insurance for the presentation and/or the event as a whole.
  7. Agrees that if the event is postponed by less than 12 months from the original date, then the 50% prepayment is applied to the new date.
  8. Agrees that if the event is cancelled or postponed by more than 12 months, your pre-payment is non-refundable.

This agreement shall be construed in accordance with the laws of the Province of Ontario.  
 I agree to the terms set forth in this contract.

\_\_\_\_\_  
 Date:

\_\_\_\_\_  
 Signed by Harry van Bommel:

\_\_\_\_\_  
 Date:

\_\_\_\_\_  
 Organization's Signing Authority

\_\_\_\_\_  
 Signing Authority's Name and Position

\_\_\_\_\_  
 Organization's Name and Address

\_\_\_\_\_  
 Contact Person's Name:

\_\_\_\_\_  
 Contact Person's Telephone Number:                      (Day)                      (Evening)

\_\_\_\_\_  
 Contact Person's Email Address

Please photocopy the signed contract for your records and return original to Legacies Inc., 11  
 Miniot Circle, Toronto, Ontario M1K 2K1 Canada, 877.427.7982, [harry@legacies.ca](mailto:harry@legacies.ca)

## Appendix 7: Site/Venue Checklist

The following is a checklist and form that may help you in (1) selecting a venue, and (2) making sure the venue you have chosen fulfills your needs (or what to do when it does not meet your needs).

Name of Venue
Address
General Manager
Banquet Manager
Other Contact Person
Contact Telephone and Fax Numbers
Contact Email
Distance from Airport(s), Train and Bus Stations, highways

**Put a checkmark before each item below and any comments after the item.**

- Free/Paid Parking
- Recently renovated, under renovation, will be under renovation during event
- Wheelchair accessibility:
  - To lobby
  - To registration tables
  - To event room(s)
  - To restaurants
  - To leisure activities
  - Fire exits
- Smoke detectors and alarms
- Room temperature controllable during event
- Lighting easy to change during event
- Soundproofing of room(s)
- Other events happening at same time
- Safe to store cash and checks
- Fire exits nearby
- Security on site
- Medical facilities on site
- Room setup (e.g., theater, classroom)
- A/V available
- Microphones
  - Lapel microphones (I prefer these for maximum flexibility in moving around the room)
  - Lectern microphones
  - Musical instrument microphones (e.g., if you are playing guitar and singing)
  - Audience microphones or table microphones for panel discussions
- Flip Charts
  - Sufficient stands/easels and pads of paper
  - Masking tape or pins to attach any to walls if necessary (and allowable at that venue)

**Overhead Projector**

- Projector
- Spare bulbs
- Stand with room for overheads

 **Slides/Films/computer shows** (e.g., PowerPoint Presentations)

- Projector
- Spare bulbs
- (Most often, speakers bring their own laptops but some may request to use a laptop at the venue)

 **Audiotape/CD**

- Player (either portable or in larger venues they have built in systems)

 **DVD/VCR**

- Player (either portable or in larger venues they have built in systems)]
- TV monitor or large screen
- Spare bulbs

 **Other Items**

- A laser pointer for the speaker to point out something on the screen.
- It is helpful to have extra-wide masking tape or duct tape to cover extension cords so people do not slip.
- Extra markers, overhead projector pens, pads of paper, etc. to accompany any of the audio-visual machinery.
- Signs for directions to event registration and room(s) including easels
- Large screens (like at rock concerts or political rallies) so large audiences can see the person speaking better
- Recording devices like audio or video cameras to record the one-day event.
- Strobe or spot lights
- Special stage designs or platforms
- Dry ice machines for mist/smoke
- Onsite office services: e.g., photocopier, telephones, internet access
- Comments on staff attitude and helpfulness

## Appendix 8: A Sample Press Release

A press release can be sent to the local media but also to allied organizations which you want to inform about the upcoming event. The following press release by Cathleen Fillmore of the **Speakers' Gold** Speakers' Bureau (<http://www.speakersgold.com>) is an example for my one-day workshop for professionals, volunteers, family and patients.

### Caring for Loved Ones Who are Dying

As his father was dying, Harry van Bommel promised him that he would learn more about caring for those who are dying and he vowed to share what he learned with others.

Although Harry had already postponed a year of University to help out when his mother was dying and had later traveled to Holland to look after his grandfather during his final illness, Harry still felt at a loss attending to some of his father's needs and knew he needed to learn more about the dying.

This was in 1984 and at the time, there were few hospice care programs in Canada and Harry was never told of any of them.

Since then, Harry van Bommel has made good his promise to his father by contributing significantly to the growth of the hospice movement in Canada.

Author of 8 books on home and hospice care, and author of another 20 books, Harry speaks to groups nationally and internationally about caring for people who have long-term condition or who are dying and helps groups raise funds to promote their organizations. 200,000 copies of two of his books have reached an audience of over a million readers making him Canada's most widely read and listened to hospice care writer and teacher.

To celebrate 30 years of hospice care in Canada, Harry is on a cross-country tour to help hospice and community programs increase their public awareness and to help them raise much needed dollars. His speeches and workshops present the stories of patients and families and their care providers. He reminds his audiences that people never have to die in pain. He illustrates how people can live fully until their death through excellent hospice care like that practiced in (name of your community).

**For more information, call ....** (Your name and contact information here)

Mr. van Bommel is available for interviews by telephone or e-mail before the event or personally on the day of the event. Call our office to schedule an interview.

— 30 —

\* The sign “- 30 -” is the symbol telling the reader that the press release is over

## Appendix 9: Final Preparations

Put a check mark before each item as they are completed.

**Two weeks before the workshop**, send the speaker(s) detailed information that includes:

- Information on their flight (if you scheduled it) and their room accommodations.
- The name of any person meeting them at the airport, train station or hotel to welcome them, if any.
- Contact information for them when they arrive (your telephone numbers at work and home; the hotel's telephone number, a cab company you recommend, telephone number at the venue).
- Expected time for them to show up at the venue and directions to it if not at the same location as their accommodations.
- Any program changes that affect the speaker(s).
- Number of registrants.
- The names of any other speakers and guests at the event so the speaker is aware of their names before any introductions are made – helps them remember people's names and who they are.
- The names of any people sharing a head table or lunch table with the speaker.

**During the last week** before the event, there are things that must be done:

- Confirm all travel and hotel arrangements for your speaker(s) and out-of-town participants.
- Confirm the venue's booking, menu, room set up, contact person's name for a/v requirements and room problems during the day.
- Call the speaker to confirm they received your package last week, to confirm their availability for the event and to answer their last minute questions (usually about the number of registrants, directions to the venue). Even though their questions were probably answered in some of the information you sent them originally or last week, they are likely involved in many events and forget specific details quite easily.
- Prepare the handout packages for the participants. This often involves combining the handout material with the free 'gifts' by sponsors and the venue (notepads, pens) plus the agenda/program for the day, name badges, evaluation form, information on the organization putting on the event, a greeting from the mayor and other politicians (if suitable for the day), content material from the speaker(s), participants' contact list, venue site plan, tourist information (if appropriate for type of event), exhibitors' contact, sponsors's contact list, etc.
- Name badges that hand around the neck are easiest as they do not damage clothing (like stick-on badges). The badge can include first name in larger letters, last name, job title, organization's name where they work. The badge should be checked against the registration form. Have blank badges available to make corrections on site. The badge may include a logo of the workshop title and/or your organization's name as host.
- Ensure you have extra registration forms for last minute registrants.
- Ensure you have receipt forms (in duplicate) for new registrants as well as receipts for those

who pre-paid.

- Prepare draft 'scripts' for:

**Event Chair**

- Welcome
- Housekeeping (e.g., where restrooms are, introduce co-ordinator for the day who will answer any questions, lunch and break times)
- Thank the sponsors and exhibitors
- Info on any draws or contests for the day
- Where smoking area is

**Those introducing and thanking the speaker(s).**

- Your speaker(s) may well have a basic introduction script prepared for their clients that you can modify to suit the occasion.
- Thanking the speaker usually includes a 30-second or less personal highlight or summary of the presentation.

**You will need to know how to deal with:**

- Refunds
- Lost badges, programs, etc.
- "Lost" registrations
- On site registrants who want to attend on "credit" (i.e., pay later)
- Pre-registered participants who still owe money
- Handling cash and checks on site and where to put it until it can be deposited – the venue may have a safe on site that you can use.
- Theft of any items
- Injuries or medical emergencies (have first aid kit plus contact information for local ambulance/paramedic services)
- Complaints about venue, food, speaker(s)

**Have enough:**

- pens and pencils,
- paper,
- staplers and staples, staple removers,
- (cellophane and duct) tape,
- scissors, glue,
- paper clips,
- calculator,
- blank name badges,
- ribbons to identify speakers, workshop organizers, sponsors,
- extra programs for the registration table at the event.
- Ensure that you have an up-to-date registrants' list.
- Ensure that you have extra copies of the handout packages for last-minute registrants.
- Ensure you have cell phones for each of the planners and that they have sufficient battery life for the day.
- Make contact with the venue for any last minute changes, decisions, or requests.
- Assign someone, or do it yourself, to welcome the speaker personally upon their arrival. If they have traveled in from out-of-town, it may be helpful to meet them at the airport or hotel or to have a note waiting for them at the hotel from you.
- Assign someone, or do it yourself, to prepare and give the introduction to the speaker at

the event. This person can also do any “housekeeping” announcements. Make sure they understand the importance of staying on schedule.

- Prepare signs (or have the venue do it) showing people:
  - where to go as they enter the building at the different doorways
  - which way to go at stairways, end of hallways and at elevators,
  - outside the venue room(s).
- Assign someone to thank the speaker at the end of the event (if different from the person who introduced them). You may decide to give the speaker(s) a memento of the community as a gift so that will need to be on hand for the event.
- Prepare a final check for the speaker(s) to cover the remainder of their fee. If you need an invoice, ask the speaker to e-mail or fax it to you immediately so they can be paid on time according to the speaker’s contract.
- Send out reminder e-mails (or call, if necessary) to registrants with directions to the venue, the starting and finishing times and an offer for last minute discounts to any of their colleagues, family and friends.

**Lastly, make sure you have as much rest as you possibly can before the event so that you are relatively calm and relaxed and in control of all the last minute things that happen on the day of the event. It won’t go perfectly, but if you have followed most of the steps to now, it will certainly go very smoothly from the perspective of the participants (who rarely know how much effort it takes to put on a good event!).**

## Appendix 10: Event Day Checklist

- ❑ Arrive early to set up the registration table and to make sure that the room is set up properly. Make sure there is a natural traffic flow so that people can easily stop to register or collect their handout materials and move on from there to breakfast, snacks or find their seat.
- ❑ If there are a lot of people expected to come, have two registration tables: (1) for those who pre-registered and just need their handout package, (2) those who need to register.
- ❑ Introduce yourself to the a/v technician on call during the day and test all audio-visual equipment and any sound system. If the a/v technician is not staying for the day, assign a volunteer to work with the technician to work out typical problems with the system so that the volunteer can meet the speaker(s) needs during the day.
- ❑ Find out where the lights and temperature controls are and assign a volunteer to ensure that any changes to the lights and temperature during the day are done well. It is amazing how much is wasted during many events while people try to search out the lights and then figure out how to use them.
- ❑ If you have help, ensure that everyone knows their tasks and has the tools and materials needed to fulfill their task.
- ❑ Have a 'greeter' beyond someone at the registration desk. When people first arrive, they don't know where to go, don't know how to get rid of their coat, don't know where the restrooms are, where to sit, don't know other participants, etc. The more you can do to welcome them, the greater their enjoyment of the day. Like visitors to your home, the more personal the welcome, the more pleasant the visit.
- ❑ Place sufficient signs around the venue so people can find the rooms easily.
- ❑ If there is a complimentary breakfast, ensure that it is well laid out and in time for early arrivals. The people from farthest away are usually the first to arrive and they have often not had anything to eat.
- ❑ Have the speaker(s)'s greeter on standby as you are not sure when they will arrive. This person will then escort the speaker(s) to the room, help them set up, show them where the restrooms are, introduce them to the people helping with sound, lights, and the a/v equipment. They should be the speaker(s)'s assistant for the day to ensure that everything they need is available to make the day go as smoothly for them as possible.
- ❑ If you are the only event planner for the day (as opposed to a committee member), then you need to be readily accessible to everyone else (those helping and those participating). It is best to stay near the registration table or in the event room.

- ❑ During the day, as decisions need to be made about when to break, how to stop the speaker(s) for lunch, etc., you need to be readily available as well. Things may go wrong with the a/v equipment and you will need to find the technician. The food may be late for lunch and you can ask the speaker to go a bit longer. The room temperature will likely need to be changed from the cool of the morning to the heat of the day.
- ❑ At the end of the event, someone will need to thank the speaker, present them with a gift (if appropriate).
- ❑ Make sure that participants are asked to fill out their evaluations before leaving (people rarely send them in afterward). As an incentive, give each a 'parting' gift of a donated item from one of the sponsors in exchange for the evaluation form.
- ❑ After the event, pay the speakers the remainder of their fee and pass along any general feedback you have heard from the participants.
- ❑ Once everything is cleaned up, the speaker(s) and participants have left, take a moment with those who have helped out to say "thank you" and to celebrate in some small way. You have pulled off a successful event with their help and you all deserve to feel good about that. Most often, people just shuffle off home exhausted and relieved that the day went well. People should leave more excited than that!

## Appendix 11: Program Requirements

**EQUIPMENT** (Date you ordered equipment if you need to rent them):

- |   |   |
|---|---|
| <input type="checkbox"/> Overhead Projector             | <input type="checkbox"/> VCR + TV (Monitor)             |
| <input type="checkbox"/> Video camera                   | <input type="checkbox"/> Flip Chart(s)                  |
| <input type="checkbox"/> Slide Projector (+ extra bulb) | <input type="checkbox"/> 16 mm Projector (+ extra bulb) |
| <input type="checkbox"/> Screen                         | <input type="checkbox"/> Chalk board                    |
| <input type="checkbox"/> Lectern                        | <input type="checkbox"/> Microphone(s)                  |
| <input type="checkbox"/> Extension cord(s)              | <input type="checkbox"/> Tripod                         |
| <input type="checkbox"/> Tape Recorder/Player & Speaker | <input type="checkbox"/> computer                       |
| <input type="checkbox"/> LCD projector                  | <input type="checkbox"/> Other:                         |

**PERSONAL ITEMS:**

- Handout Resources:
- Reading Materials: (List under here)

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- Physical Items: (List under here)

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- |   |   |
|---|---|
| <input type="checkbox"/> Agendas/Schedules  | <input type="checkbox"/> Attendance Forms |
| <input type="checkbox"/> Name Tags          | <input type="checkbox"/> Evaluation Forms |
| <input type="checkbox"/> Flip Chart Markers | <input type="checkbox"/> Overheads        |
| <input type="checkbox"/> Overhead Pens      | <input type="checkbox"/> Overhead Blanks  |
| <input type="checkbox"/> Slides             | <input type="checkbox"/> Pointer          |
| <input type="checkbox"/> Videos/Films       | <input type="checkbox"/> Audio Tape(s)    |

**Accessories:**

- |   |  |
|---|--|
| <input type="checkbox"/> Chalk            | <input type="checkbox"/> Masking Tape                  |
| <input type="checkbox"/> Scotch Tape      | <input type="checkbox"/> Paper & Pens                  |
| <input type="checkbox"/> Scissors         | <input type="checkbox"/> Thumb Tacks                   |
| <input type="checkbox"/> Ruler            | <input type="checkbox"/> Paper Clips                   |
| <input type="checkbox"/> Correction Fluid | <input type="checkbox"/> Direction Signs for Classroom |

**Personal Accessories:**

- |                                       |   |
|---------------------------------------|---|
| <input type="checkbox"/> Water Glass  | <input type="checkbox"/> Candy                            |
| <input type="checkbox"/> Tissues      | <input type="checkbox"/> Brush/Comb, other grooming items |
| <input type="checkbox"/> Other Items: |   |



## Appendix 13: Evaluation Form

### Detailed Version

**(Your Point of View Helps Us Improve Our Events)**

NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

Please circle a number to indicate your evaluation. Five (5) is the highest rating you can give; one (1) is the lowest.

#### **SPEAKER EVALUATION COMMENTS**

- |   |           |
|---|-----------|
| 1. Apparent knowledge of the subject                | 1 2 3 4 5 |
| 2. Apparent interest and enthusiasm                 | 1 2 3 4 5 |
| 3. Clarifies, simplifies theories or abstract ideas | 1 2 3 4 5 |
| 4. Confidence in self and ability                   | 1 2 3 4 5 |

#### **SPEAKER'S COMMUNICATION SKILLS**

- |  |           |
|--|-----------|
| 1. Voice level                               | 1 2 3 4 5 |
| 2. Voice tone                                | 1 2 3 4 5 |
| 3. Use of examples                           | 1 2 3 4 5 |
| 4. Asks meaningful questions                 | 1 2 3 4 5 |
| 5. Encourages participant contributions      | 1 2 3 4 5 |
| 6. Participants' interest generated          | 1 2 3 4 5 |
| 7. Pace and flow of lesson                   | 1 2 3 4 5 |
| 8. Mannerisms and gestures                   | 1 2 3 4 5 |
| 9. Understandability (choice of words, etc.) | 1 2 3 4 5 |
| 10. Learning atmosphere created              | 1 2 3 4 5 |
| 11. Control and direction of class           | 1 2 3 4 5 |
| 12. Appearance (dress, etc.)                 | 1 2 3 4 5 |
| 13. Culturally unbiased                      | 1 2 3 4 5 |

#### **EVALUATION OF PREPARATION**

- |   |           |
|---|-----------|
| 1. Organization of presentation                 | 1 2 3 4 5 |
| 2. Thoroughness of preparation and presentation | 1 2 3 4 5 |
| 3. Logical Progression of presentation          | 1 2 3 4 5 |

#### **EVALUATION OF RESOURCE MATERIAL**

- |                              |           |
|------------------------------|-----------|
| 1. Organization of Materials | 1 2 3 4 5 |
| 2. Easy to Read              | 1 2 3 4 5 |
| 3. Sufficient Information    | 1 2 3 4 5 |
| 4. Self-Instructional        | 1 2 3 4 5 |

What did you like most or find most useful about this program and the resources used?

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What did you like least or find least useful about this program and the resources used?

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What would you change or do differently about this event?

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In a similar event, how would you change your own participation to make the event more useful to you?

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How would you change this evaluation form?

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Any other comments or suggestions? (Please answer on the back of this page.)

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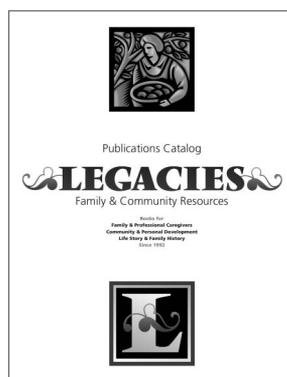
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# The Essential Hospice Library



**For a complete list of Legacies books, request your catalog today!**  
**<http://www.legacies.ca>**



## **Caring for Loved Ones at Home** **An Illustrated, Easy-to-Follow Guide** **to Short or Long-Term Care**

A practical guide to help family members take care of someone who is ill at home.

Over 120,000 copies of this perennial bestseller have been produced since 1992. Harry van Bommel believes that providing home care for loved ones is one of the most precious gifts we can give them and ourselves. These are times of great love, intimacy and laughter. These are also times of frustration and exhaustion, often caused by a lack of practical skills and support. From personal experience and extensive research, he gives step-by-step instructions, with illustrations, on how to provide basic home care. As well as practical skills, this book provides caregivers with questions to ask the right people so you can better understand tests, drugs, diagnoses, infections and treatment alternatives. It lists questions to ask when going to the hospital, undergoing surgery and includes a glossary of medical and home care terms.



Harry van Bommel is the author of 28 books in the fields of home and hospice care; management and staff development; adult learning; and how to help people record their life stories or family histories. His interest in home care comes from helping both his parents and grandfather live at home until they died as well as providing care during the birth of his children and when family and friends are ill or recovering from an illness. His writing and teaching of home care are presented from a patient and family perspective.

**4th revised edition, 160 pages, 5 x 8 inches, ISBN 1-55307-016-X,**  
**\$15 ebook, \$20 paperback**

# Family Hospice Care

## Pre-Planning and Care Guide

Bestseller! Over 100 thousand copies of this comprehensive caregiver resource have been sold since it was first published in 1986. Covers the physical, emotional, spiritual and information needs of patients, families, other care providers, volunteers and students.

In the twenty years since this book was first published, hundreds of thousands of patients, family members, professional and volunteer care providers have learned the basic fundamentals of providing physical, emotional, spiritual and information supports.

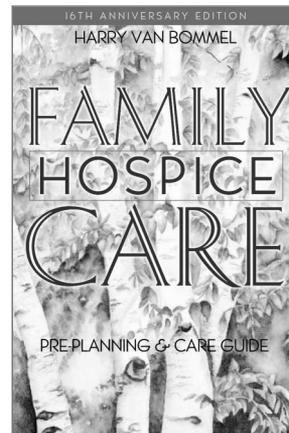
People need to be relatively pain free and alert for as long as they can. The hospice philosophy of care is about living life to its fullest before you die. That is not what typically happens for people near the end of their lives. Their physical pain is often not controlled well. That is inexcusable. No one need suffer unbearable pain. No one.

Many people hope that their last weeks and months will be filled with compassionate medical support, well-informed and caring family and friends, and information on how to live life fully. That is what excellent hospice care is all about. That is what Family Hospice Care is all about.

Harry van Bommel helped his mother, father and grandfather to live at home until they died. He has helped countless others through his writing, speaking, teaching and one-to-one support turn an end-of-life experience into something to be treasured rather than feared. His detailed suggestions help people take some control of the roller coaster ride of emotions, feelings and experiences.

The journey at the end-of-life will have moments of frustration, anger, tears, despair and overwhelming fear. That is too often the only experiences people have. Family Hospice Care is a tool that helps you minimize these negative experiences while providing specific ideas so that you can also experience profound moments of love, laughter, joy, retelling of stories, bonding with family and friends and care providers. Like birth, death can be an incredible opportunity to review your own life and its direction and find out the wisdom of all ages: it is our relationships with others that matter most at these times. Living fully until you die provides an opportunity to nurture those relationships to an even greater degree.

When family and friends cannot care for someone, other people including hospice volunteers and neighbors can be immensely helpful. People need never die alone and uncared for. Hospice care is all about making sure that everyone involved in someone's last days, weeks and months participates in a profound experience that truly becomes a memorable, life-defining one.



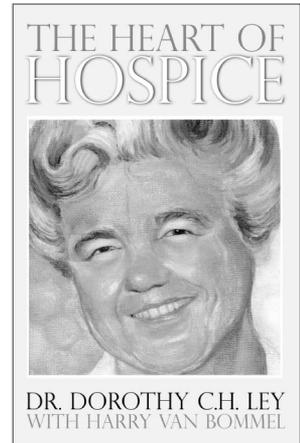
**20th anniversary edition, 320 pages, 5-1/2 x 8-1/2 inches, ISBN 1-55307-021-6,  
\$25 ebook, \$30 paperback**

# The Heart of Hospice

**Dorothy Ley with Harry van Bommel**

The spiritual heart of hospice as well as other aspects of the hospice philosophy of care are chronicled. Includes a biographical sketch of Dr. Dorothy Ley, a Canadian and international pioneer of the hospice care movement, with photographs.

*"Spiritual care lies at the heart of hospice. It says we are here. We will be with you in your living and your dying. We will free you from pain and give you the freedom to find your own meaning in your own life - your way. We will comfort you and those you love -- not always with words, often with a touch or a glance. We will bring you hope - not for tomorrow but for this day. We will not leave you. We will watch with you. We will be there." - Dorothy Ley*



*The Heart of Hospice* provides a useful and inspirational educational tool for palliative care providers primarily but also for everyone interested in palliative care. The insights of one of the pioneers in Canada are practical, direct, humorous, colorful and inspirational. Her experiences lend a practicality and a credibility to this work that is hard to find elsewhere. Best of all, we can learn from someone who actually practiced what she taught. She was a very human role model to physicians, other health care providers, family members and now to patients.

The book is divided into three parts. The first part includes the Introduction and the two chapters on the pillars of care and Dr. Ley's personal comments to people within palliative care. Her words are a compilation of various speeches and articles that she wrote over the years about the importance of providing physical, emotional, spiritual, and information supports to people with a life-threatening or terminal illness and their families. They are her words supplemented by information collected during conversations with Harry van Bommel. The second part describes some hospice care success stories including the excellent hospice care that Dr. Ley received in her own last months of life. The third part is a collection of information that readers may find helpful in understanding both Dorothy Ley and her message.

The book is called *The Heart of Hospice* because Dr. Ley understood the often forgotten spiritual element to palliative care. In a real sense, her belief in, and promotion of, palliative care and her experiences as a doctor, family member and patient put her at the heart of hospice as well - a well deserved place in the history of this young movement.

**135 pages, 5-1/2 x 8-1/2 inches, ISBN 1-55307-022-4, \$15 ebook, \$20 paperback**

# **The Hospice Care Handbook**

## **The Fundamentals of Patient and Family Care for Health Care Professionals, Volunteers and Students**

This book presents the information about the fundamentals of excellent patient and family care in typical situation, and what most professionals and receivers of service agree is most needed on a daily basis.

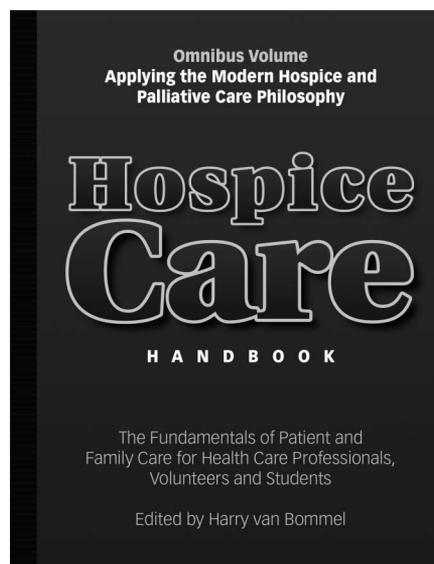
This text is not a summary of the latest literature and studies in dying, death and bereavement. There are academic texts that already fill that need admirably. They are referenced in this handbook. It includes extensive, practical information on enhancing a professional or volunteer's 'soft skills' in communication, planning, and intra-personal and inter-agency co-operation. We often assume people learn and practice these 'soft skills' yet few people have ever learned these skills in a systematic way. It examines the roles of patients, families and friends and neighbours in an inter-disciplinary or multi-disciplinary approach to palliative care. The extensive reference section is to encourage readers to build on the fundamentals and pursue life-long learning by studying the experts in their respective fields.

Harry van Bommel is a family practitioner of hospice care with over 25 years of experiences. He is also an advocate for excellent palliative care, family member and friend, and some times, a patient. From his personal experiences he believes that people need clear, brief and practical information. The majority of those actively involved with people who have a terminal or life-threatening illness want something that can help today. The book includes many lists, forms and numbered ideas to make it easier to find and use what you need. For those who want greater detail, or want to examine clinical studies or academic presentations I have included a comprehensive annotated list of recommended readings.

Those of you who are physicians, nurses, social workers, chaplains, allied therapists, pharmacists, dieticians, administrators, volunteers, family members and patients can all benefit from the combined wisdom of palliative care providers, receivers and educators. This book will supplement, not replace, your own professional education. It will reinforce many of the reasons why you chose your professional or volunteer work as it is centred on the impact of your care on others. The book contains over 1000 pages combining books, presentations and teaching materials, divided into the following eight units:

1. Introduction and Groundwork
2. Applying the Palliative Care Philosophy
3. Communication Skills
4. Co-operative Palliative Care
5. Ethical Questions
6. Professional Skills Development
7. Appendices
8. Teacher/Instructor's Guide.

**1000 pages, 8-1/2 x 11 inches, ISBN 1-55307-009-7, \$80 ebook**



# Personal Hospice Journal

## of Beliefs, Assumptions and Behaviors

A book that helps you record your thoughts on over 160 topics relating to hospice and home care.

Journaling is an excuse for us to spend some time on our own. It encourages us to reflect on our thoughts, beliefs and behaviors so that we can decide what we would like to keep and what we would like to change.

This journal has Harry van Bommel's thoughts on the many topics outlined in the Table of Contents. They are thoughts based upon over 25 years in the hospice care field first as a family member caring for his parents and grandfather at home and later as a researcher, writer, teacher and mentor.

You can use this journal in two ways:

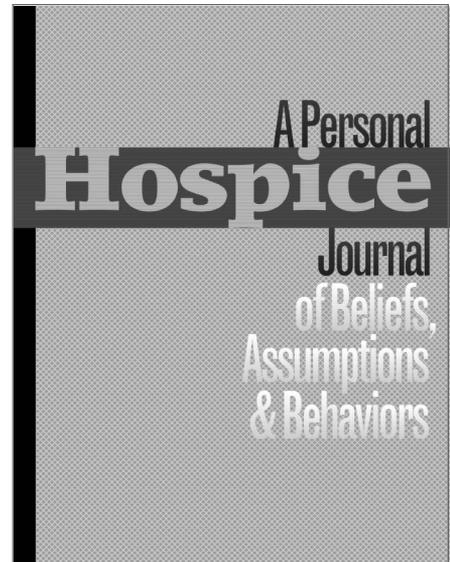
**1. As a learning tool.** van Bommel does not suggest reading the whole book at once. It will sound repetitive (which it has to be if one's beliefs, assumptions and behaviors are somewhat consistent). Pick a few topics that peak your interest. You can ignore his reflections and write your own right away or you may want to respond to his thoughts by agreeing, disagreeing or adding another perspective to the same thought. Remember the idea is to have some fun while examining your own beliefs, assumptions and attitudes.

There are a lot of topics to write your thoughts on. Perhaps there are too many headings. Write about those thoughts that interest you and ignore the rest. If you have summarizing thoughts that reduce your beliefs into several special thoughts; write those instead. This is your journal. Do what you like.

**2. As a typical journal.** You may want to use this journal to record daily thoughts, a dream diary or any other form of journaling. The thoughts van Bommel has on each page could be just for your interest. Use it as a 'thought for the hospice day' and add your own thoughts on any workday. There is no time limit for writing in a journal. It might take you a few weeks or a few years.

This book makes an excellent gift for a young student going into the hospice care field as this is often one of the most reflective times of their lives. It can be very helpful to those practising in the field now to help them remember what was, is and should be important to them in their ongoing efforts to fulfil the hospice philosophy of care. Lastly, the journal may be an appropriate gift to someone retiring from the field as a request that they share their thoughts with their colleagues still in the field. There is a liberating feeling when one retires that allows them to say what they truly feel without editing themselves for political, collegial or job-security reasons.

**128 pages, 8-1/2 x 11 inches, ISBN 1-55307-030-5, \$15 ebook, \$20 paperback**



# Dying for Care

## Hospice Care or Euthanasia

*I hope we restore society's sense of the value of life. We must restore the joy in caring for people who are dying.* - Dorothy C.H. Ley, M.D., F.R.C.P.(C), F.A.C.P., Founder and first President of the Canadian Palliative Care Foundation

No one has to suffer unbearable pain and symptoms in North America. No one. Yet tens of thousands do every day. Is it any wonder that people want to know more about euthanasia? People do not want to experience the horrific deaths that many of their parents and grandparents experienced.

Hospice care, well practised and rooted in the philosophy of meeting individual's physical, emotional, spiritual and information needs is one answer to the cravings that North Americans have for a dignified dying process.

Harry van Bommel wanted to know what was really happening in Canada. He sent questionnaires out to the leaders, professionals and volunteers, in the field to get their ideas. This book summarises their views admirably.

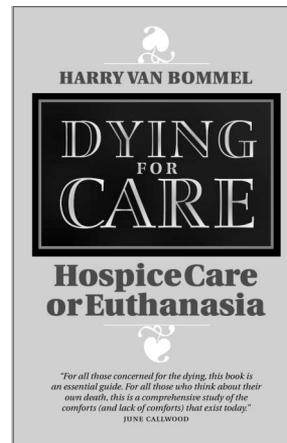
Across Canada there are people who have a terminal illness, such as the end stages of heart disease, cancer, and AIDS, who are pain free, mentally alert, able to participate in making decisions, and talk with their families, comfortable and able to give and receive emotional and spiritual support with the people they love. These people are benefiting from palliative care either through a formal program of care or through an informal network of support from their doctors, visiting home nursing, home care programs and their families. Unfortunately they are not the majority.

This book addresses what needs to be available to provide excellent health care at the end of someone's life. These are not the idealistic musings of uninformed advocates but the thoughtful considerations of front-line practitioners of end-of-life care.

Dying for Care discusses the benefits and needs for more hospice care and examines euthanasia within the greater context of what people who are dying really want. Dying for Care will also present current information on Canadian hospice care as well as providing a public forum for the thoughts of some of Canada's palliative care and euthanasia experts.

*For all those concerned for the dying, this book is an essential guide ... for all those who think about their own death, this is a comprehensive study of the comforts (and lack of comforts) that exist today.* - June Callwood

**112 pages, 5-1/2 x 8-1/2 inches, ISBN 1-55307-023-2, \$15 ebook**



# **Selected Journals on Grieving**

## **King's College 16th International Conference on Death and Bereavement**

**Edited by Harry van Bommel**

Professional and volunteer grief therapists share their personal and professional stories about grief and bereavement during this 3-day conference at King's College, London, Ontario. The stories can be used in your own practice, newsletters and presentations as illustrations of how others deal with their grief.

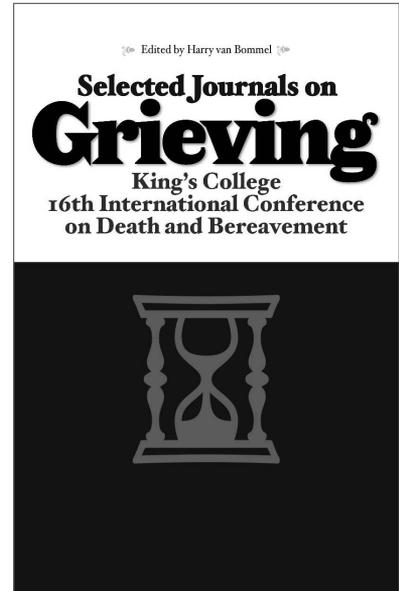
Leo Tolstoy wrote that every time we write we should leave a bit of our blood in the ink pot. The stories in this book do exactly that. The stories are thoughtful, personal and a great testament to the importance of human relationships in all their many forms.

The stories in this book look at: views by professionals about their work; personal stories by spouses, parents, children and siblings; spiritual aspects of care; the importance of animals in people's lives; philosophical musings; and so much more.

Each story is a short vignette of a person's journey through grief. These are stories about practical things that people have done to help others or to help themselves. One or more of these stories will touch your heart because we have all grieved the death of someone we love. In reading how others have dealt with such loss, we identify how we are coping and what we need to continue to do to help others while also looking at things we might want to do differently so that we don't hurt ourselves or others we love.

This material was gathered at King's College 16th International Conference on Death and Bereavement in London, Ontario, Canada. Everyone who has participated in the project has ensured that their stories are free of error and respect the confidentiality of the people involved as necessary. They retain copyright for their own stories and accept responsibility for what is recorded.

**84 pages, 6 x 9 inches, ISBN 1-55307-024-0, \$15 ebook, \$20 paperback**



# About Legacies

**Legacies: Family and Community Resources** was founded as a not-for-profit Canadian corporation in 1999. It's mission is to support individuals, families and communities in creating meaningful legacies through community development, hospice and home care, and Canada 150, our 20-year project to encourage Canadians to record their life stories and family histories. Harry van Bommel and Janet Klees are the founders and directors.

**Legacies: Family and Community Resources** has a simple philosophy:

1. Stay small and think big.
2. Use volunteers whenever possible and, when necessary, collaborate with thoughtful, committed and determined people.
3. Reach the widest audience possible with information that is practical and immediately useful.
4. Recognize and encourage the mutual exchange of people's gifts for the betterment of individuals, families and communities.

## **Legacies:**

Family and Community Resources



11 Miniot Circle, Scarborough Ontario M1K 2K1 Canada  
Telephone 416.264.4665 Fax 800.684.7280

Legacies is on the web at: <http://www.legacies.ca>