

# HOSTING A SHIFT WORKSHOP

# How To Host A Shift Workshop

Convene your key staff, partners, volunteers, and/or fans and begin brainstorming possible locations, dates, additional partners, participant lists, and topics that you think might be good for your community to focus on in the workshop. Ideally you will have 3 months to organize and market for the workshop. If you already have a participant group identified and confirmed, you may not need to market the workshop and your timeline can be reduced drastically. We recommend having an eight-week marketing campaign to recruit participants if this is the first workshop in your community.

Consider using the Shift Project Canvas to work through the details of your workshop. Set participation goals and define success for the participants and the community. List existing and potential partners, define your target audience (participants), identify potential costs and determine how you will cover necessary room rental, food, supplies, facilitator fees, if any. Decide registration fees and scholarship options. Think about setting participant diversity goals.

Assign tasks and set deadlines for making final decisions about dates, locations, and fees.

Begin marketing strategy work by identifying lead person to manage the marketing work. Share partner logos, newsletter and social media schedules, and decide how to use email lists and other contact information for potential participants. Use Facebook, Google, or other platform to collect photos of facilitators, partners, the community for use in marketing.

Review the How to Host a Shift Workshop materials to set next meetings and identify roles and responsibilities for the team.



# Workshop Marketing & Production Timeline

## Three Months Out

Convene a meeting for all the event partners to determine logistics, set roles, and plan marketing strategy together. Brainstorm additional partners and groups to target for participation and marketing. Determine how many facilitators you think you will need – one for each team plus one Lead Facilitator who can do the Paradigm Shift long presentation, float to support the other facilitators on Day Two, and lead the activities on Day Three during the coaching sessions. Depending on the skill of your Lead Facilitator, this person may also be able to handle food logistics during the workshop, but it would be ideal to have a volunteer available for that kind of event support.

Determine the budget for the workshop. You may be able to reduce costs by getting donations for space, food, printing, and facilitator housing. We encourage the use of homestays for any traveling facilitators if the facilitator is comfortable with that option. Some people love getting a chance to meet local people and families. You should confirm that the facilitator will have a clean private room and easy bathroom access. The hosts should understand that the facilitator may be very tired and may need downtime.

- Identify someone to confirm the workshop site and related logistics.
- Identify email and phone number for questions from potential participants. This should be included on all fliers, marketing materials, and press releases.
- Identify judges because they may be able to provide implementation funds and could be part of your marketing strategy.
- Identify someone to make sponsorship asks locally to help cover event costs or provide donations for things like facility, food, housing and supplies.

After the meeting where you set all the workshop details, Create the EventBrite and Facebook events so that they are ready for marketing going forward. Include the contact information on those event pages as well. Gather photos and bios of all facilitators and/or judges so that you are ready for marketing them. Review the flier and social media templates provided by AIR. Modify with your local logos and photos if you want.

## Two Months Out

- Send emails and targeted communications to all groups that have lists of likely participants – like chambers of commerce, arts councils, civic groups, rotary, library newsletters, hospital support leagues, board of education, churches, city council, boards and commissions, etc.
- Send PSA event announcements to print media and radio for free announcements of the event details. Include partners and sponsors in the press releases.
- Begin social media campaign. AIR has provided 8 weeks of messaging and templated photos for Facebook that can be used for other social media outlets like Instagram and Twitter. You can modify as you want to use localized information and photos. Make sure you include sponsors in your campaign.

## One Month Out

- Secure food and any needed facilitator housing for the workshop.
- Secure volunteer or staff to manage food and logistics during the workshop - this should not be a facilitator.
- Send additional targeted communication to groups that you hope to have participating in the workshop.

- Contract with facilitators – have clear cancelation clause for low enrollment/weather/acts of God.

### **Two Weeks Out**

- Determine viability of the workshop size and confirm contracted facilitators.
- Purchase and/or collect all Shift Workshop supplies (see list above) and create or restock
- Shift Workshop Toolbox that has normal event supplies in it.
- Confirm food
- Convene Facilitators to divide up presentations and go over logistics.
- Confirm event site contact person phone numbers one more time and arrange for walk through for one week out.

### **One Week Out**

Really confirm food and any food volunteers.

Purchase all sundries for snacks, beverages, and other food that is nonperishable. Gather with Toolbox.

Visit site to confirm room logistics and do tech run through. Identify private space for coaching sessions on Day Three. Determine if training room(s) can be locked with event materials overnight during the workshop. Ask about keys and lights and any other facility requirements or expectations related to cleaning and usage.

- Print all materials and make nametags when you finalize participant list.
- Send welcome email to participants that includes pre-workshop survey. Send welcome email to participants as they register before your deadline (if you have stragglers)
- Set up Workshop Facebook Private Group with AIR staff help.
- Send email to judges with event details and judging form

**BONUS:** create a playlist for creating a welcoming space for your workshop



# Workshop Day One

## MORNING

Premeeting with facilitators that includes: go over Day One agenda, dine around logistics, pick teams, make adjustments to power point slide with team lists, identified guests, determine placard order for Who Are We Exercise.

Set up room classroom style with room or plan for other exercises. Easels, tables, chairs, etc. should be in the room and ready for use. Identify a table for facilitators in back or on the side of room. Have placards and timer ready for use in exercises.

Set up technology and test all videos and sound

Bring all printed materials and workshop supplies include Toolbox to the site

Set up food service area and organize kitchen if needed

Check bathroom supplies

Set up registration area with name tags, sign in sheet, and participant guide, and pens

Put out snacks and beverages and party supplies

Set out Dine Around Sign up Sheets with pens

Post Wifi Password instructions

Post signage if needed for bathrooms or registration if building is large.

Post outdoor Workshop signage on building if appropriate – so people know they are in the right place.

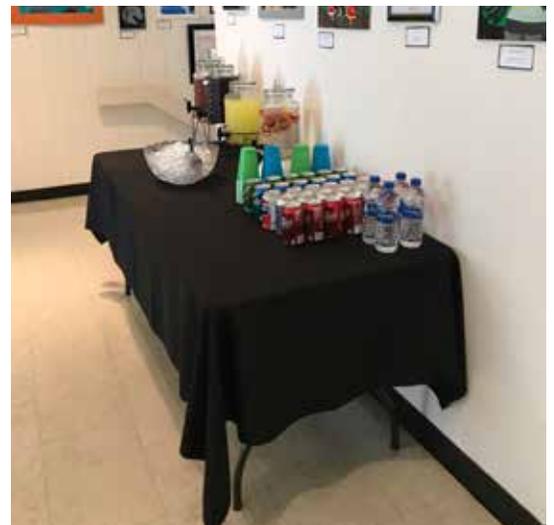
Confirm if you can leave items in the training room overnight safely.

Have food and all event prep ready one hour before event begins.

**BONUS:** Bring flowers and foliage in vases, use linens on tables and have music playing during registration and breaks

Remember you need to stay until everyone leaves. Then go to a dine around. Also remember that you and all the facilitators need to be back at the event facility one hour before the event begins tomorrow morning to prep the space and get everything ready.

Confirm breakfast food plans, volunteers, and delivery.



## Workshop Day Two

Arrive one hour early.

Tidy and set up space. Refresh all beverages. Set up room for team work spaces and some classroom style seating. Check videos for sound levels. Set out easels and make sure markers work. If easel pads need tape, get tape ready for hanging during the day. Confirm lunch food.

### **GO!**

During the day someone should confirm judges one more time – especially if times are changing about when they need to be there.

Confirm the start time for Day Three with participants before they leave.

Refresh beverages and snacks throughout the day.

Confirm any food planned for Day Three.

Plan to stay until everyone leaves. You may want to have dinner with just the facilitators to share about your experiences. Remember you need to be at the event site one hour before the workshop begins on Day Three. Tidy up the space before you leave so that your job is easier in the morning.

## Workshop Day Three

Arrive one hour early. Tidy and set up space. Refresh all beverages and snacks. Set up room for team work spaces and some classroom style seating for during the presentations. Check videos for sound levels. Set out easels and make sure markers work.

Set up presentation space including judges seating area and be ready to test presentation tech for each team well before the judges arrive. Identify one facilitator to orient the judges before the presentations. Make sure you have enough copies of the judging sheets for judges. Have coaching signup sheet ready for after presentations are completed.

Make stacks of multicolored post-it notes and prep clean easel pad for final exercise.

Clean up everything.

### **CLEAN UP**

Remove all papers and materials from the event space. Remove any tape from walls. Gather all materials you brought to the site and remove when you depart. Wipe down all tables and surfaces if required. Clean kitchen and wash any dishes, serving dishes and utensils used. Sweep and vacuum if required. Replenish bathroom supplies if required. Take out trash. Turn off lights. Lock up space, technology, and/or building. Return keys if required.

Collect any participant workbooks or items that were accidentally left in the event space and send email to participants letting them know that you have those items.

# Shift Workshop Event Checklist

Workshop Dates and times: \_\_\_\_\_

Location: \_\_\_\_\_

Number of Participants: \_\_\_\_\_

Price: \_\_\_\_\_

Scholarship or stipend available: \_\_\_\_\_

Lead Facilitator: \_\_\_\_\_

Facilitators:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

Marketing Lead \_\_\_\_\_

Food and Beverage Lead \_\_\_\_\_

Sponsorship Lead \_\_\_\_\_

Event Logistics Lead \_\_\_\_\_

Partners

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

# Workshop Focus

SMART goals for Participants

SMART goals for Community

Participant Diversity Goals and Strategy

Sector Participation Goals and Strategy

Success looks like:

## Event Site Selection

Identify a free or cheap accessible location that can serve up to 45 people classroom style if you plan to have a full 36 person Shift Workshop. The site also needs room for up to 4 teams to work without distraction (can be in same room if acoustics are sufficient) and up to 4 small spaces for private coaching sessions. Obviously if your workshop will be smaller, you can look for a smaller space.

The workshop location should have electricity, Wi-Fi internet connections, climate control, bathrooms and kitchen or catering ready facilities.

- Contact person \_\_\_\_\_ phone \_\_\_\_\_ email \_\_\_\_\_
- Site Checklist
- Event Location
- Classroom Style seating for up to 45 \_\_\_\_\_
- Tables -5-8 depending on workshop size \_\_\_\_\_
- Chairs -30 - 45 depending on workshop size
- Breakout space for up to 4 teams of up to 10 people with good acoustics
- Coaching space - up to 4 small private areas for 2 people
- HVAC with thermostat access
- WiFi Access
- Kitchen or catering kitchen refrigerator, freezer, microwave, toaster, oven/warming oven, dishwasher
- Beverage supplies: coffee maker, pitchers, icemaker, mugs, cups, glasses,
- Serving supplies: platters, serving utensils, linens, plates, eating utensils, napkins,
- Bathrooms supply closet/storage
- Projector
- Laptop
- Speakers
- Microphone and amp
- Presentation slide advancer/clicker
- Easels - up to 4
- Training space can be locked overnight during workshop
- On call contact person
- On call tech person
- Lock up procedure
- Trash location
- Cleanup required
- Food and beverage can be brought in from outside facility
- Other details

### Tips:

Identify one person who is the facility contact that you can contact at any time (get multiple phone numbers) with issues like supplies, electricity or technology outage, and any other facility related emergencies. Make sure there is access to toilet paper, paper towels and other cleaning supplies that you might need during the workshop. Find out what cleaning is required after using the space. Make sure you know where to put trash and how to lock up the building.

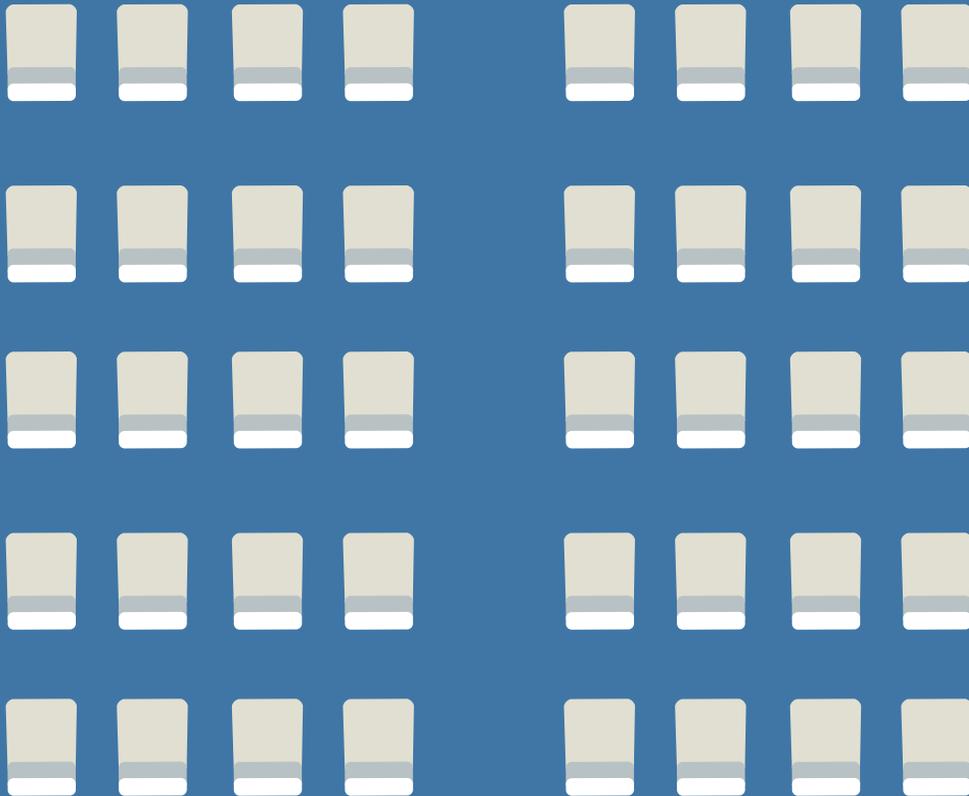
SCREEN

PODIUM

FACILITATORS

SHIFT TOOLBOX

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LECTURE SESSIONS

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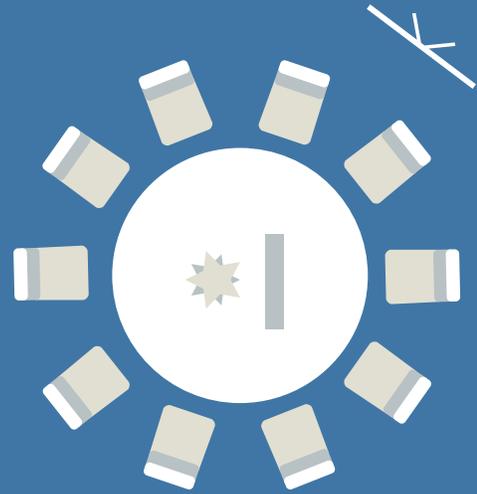
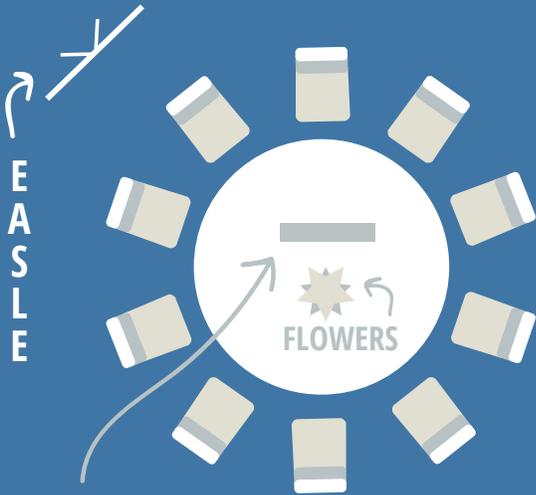
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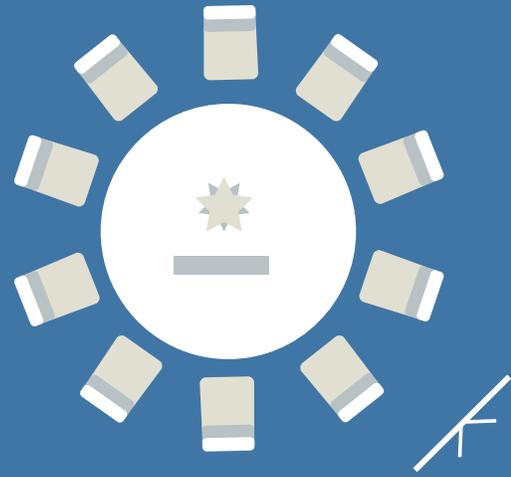
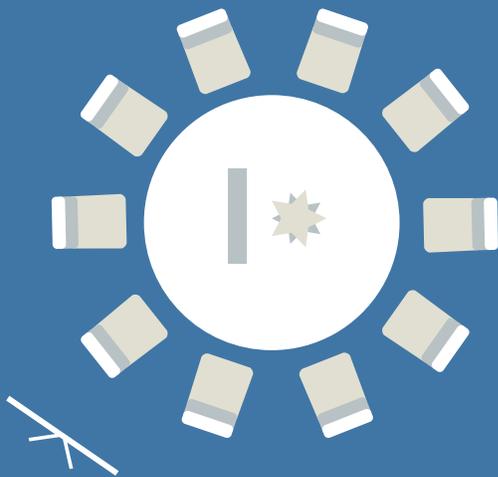
PODIUM

SHIFT TOOLBOX



PENS, DOTS,  
LAMINATED MATERIALS

# TEAM SESSIONS



FOOD

DRINKS

## Event Equipment

Up to 45 chairs to accommodate 36 participants, 5 facilitators/event project manager and any volunteers or guests

Tables that accommodate up to 10 people for each team. 4 additional tables for registration, food, beverages, and facilitators.

Easels, flipcharts, markers, dots and pens for each team.

Projector, speakers, microphone, laptop and slide advancer/clicker (with extra batteries). May also want video camera, battery and/or sim card, and tripod if you want to record any of the workshop. Extension cords and HDMI and other projector and tech connectors for presentations, audio and video. Make sure you have duct or gaffing tape to secure any cords that could be a hazard on the floor.

Timekeeping device with alarm – can be old school alarm clock, phone, stopwatch, cowbell, etc.

## Workshop Registration

Once you have set a date, gathered partners, and identified your location and facilitators, you need to set up registration and market your event.

Use Event Brite or another free registration platform that can collect money and registration contact information for the workshop. Follow instructions at <https://www.eventbrite.com/organizer/overview/>

You may want to create a Facebook event for this as well for marketing purposes only. DO not use Facebook for registration because it will be unreliable.

You should charge something for the workshop. You can allow for scholarships but make sure that you advertise a price of no less than \$175 per person for the workshop even if your price is \$25. People need to believe that the workshop is valuable, and a higher advertised price will help communicate that.

## Printed Materials Checklist

- Participant list
- Participant sign in sheet
- Participant Guides
- Name badges that are re-usable for multiple days–pins or lanyards are better than stickers
- Dine Around signup sheet for first night
- Placards for Who Are We Exercise – consider laminating for reuse
- Blank Canvases – laminate if possible
- Blank budget page – laminate if possible
- Blank Worksheets – laminate if possible
- Presentation Judging Forms for all judges – laminate some for facilitators if possible
- Coaching Schedule Sign in for Day Three

## Shift Toolbox Checklist

- 5 sets of laminated Shift canvas, budget, worksheets
- Laminated Who Are We placards
- 4 stackable bins (for facilitator tables – markers, pens, fidgets, dots, tape, laminated materials)
- 25-50 pens
- 20 Facilitator Markers (5 colors of brightly colored wide-tip markers for use on flipcharts)
- At least 4 sheets of ¾ inch colored dot stickers
- Stapler
- Scissors
- 4 Rolls of 1" masking tape
- 1 roll of duct or gaffers tape
- Binder clips
- Rubber bands
- 12' HDMI cord
- Projector connection adaptors for PC or MAC as appropriate
- 25' extension cord
- Power strip
- Slide advancer/presenter
- AAA and AA batteries as appropriate
- Ream of blank paper
- Band-Aids or first aid kit
- Blank name tags
- Timer and/or Bell
- 25 – 50 fidgets

# Shift Workshop Equipment Checklist

- Shift Workshop Toolbox is fully stocked
- Chairs for participants, facilitators, volunteers, guests, judges
- Tables for teams, plus one table each for facilitators, registration, judges, 2 tables each for food and beverage
- Podium or table for presenting
- Cart or table for projector and laptop, if needed
- Easel and full easel pad for each team
- Projector
- Speakers
- Microphone, if needed
- Laptop
- Video Camera and tripod



# Food And Beverage

Some communities really like potlucks. Organize these if that works for you. But please do not ask facilitators to provide all the meals and also facilitate. Designate a person who is not a facilitator to manage all the food so that the facilitators can do their job.

Inquire about dietary needs when you organize this workshop. We recommend you provide 10% food for vegetarians, vegans, and gluten free people if you do not know the needs of your participants. These workshops are designed for adults and we hope that adults will self-identify any food allergies but be prepared. Ask anyone providing food to give you the ingredients list so that people can avoid foods they can't tolerate. Call 911 if something happens. You are not responsible, but you should be kind.

If you are relying on others for food, confirm pickup and drop off times the day before they are expected to deliver.

Identify one person to manage meal prep and cleanup during the workshop so that food and trash are removed regularly during the event. This is a great way to engage a volunteer who isn't sure they want to attend the workshop but are curious about what you're doing.

## Day One

**Beverages:** Provide water, coffee: caf and decaf, hot and iced tea, ice, ice tongs, creamer, sugar, nondairy creamer, nonsugar sweetener, stirrers, cups, lids, napkins, **BONUS**; soda, fancy water, juice.

**Snacks:** Individually wrapped chocolate and other candies  
Small bowls for nuts, pretzels, other salty snacks. Include spoon for distribution. Small plates or bowls, napkins.

**BONUS:** cheese and crackers, granola bars, Trail mix buffet (little containers of different nuts, dried fruits, m&ms, etc), or other protein snacks.

The goal for day one is to get people to have dinner together after the workshop. Use Dine Around Sign in sheet to organize this. They pay for themselves. Facilitators should be prepared to attend.

If your workshop needs to be over dinner please try to do something easy and quick like pizza and salad (delivered so no one needs to go get it) so that you don't hold up the workshop for a sitdown meal. And leave the food out so that people can graze if needed.

## Day Two

**BREAKFAST:** See beverages above.

Include fruit and protein heavy options. **DO NOT JUST PROVIDE DONUTS** or other carbs. The participants and facilitators will crash. Bagels **AND** cream cheese. Breakfast sandwiches. Yogurt and cereal. Don't go overboard but do make sure people feel happy and nourished. Contact local businesses to get donations and make sure to provide signage and public thank yous for any food provided. Provide plates, bowls, utensils, napkins, serving spoons and knives. May need toaster and microwave depending on what you provide. Don't forget condiments like butter, jelly, syrup, etc.

LUNCH: Beverages see above.

Contact local businesses or people who may want to provide food. Ideally soup and sandwich options are great. Again be mindful of dietary needs. Some people in your community may really enjoy providing a crockpot of soup or a baked pasta for this workshop. We encourage that kind of community engagement. Provide all necessary plates, utensils, etc. ABSOLUTELY PROVIDE DESSERT.

AFTERNOON REFRESHMENTS: Keep lunch out as long as you like (without risking anyone's health) Also refresh snacks from day 1 to be available in the afternoon. Refresh all drinks.

Dinner on own.

### **Day Three**

This depends on the hours of your workshop. You may need to provide breakfast, lunch, and/or snacks or some combination thereof. You should provide all drinks and snacks normally provided.



# Follow Up

Send email to all participants with workshop evaluation link (AIR will provide link for your specific workshop). Send thank you letters or emails to sponsors, hosts, judges, food donators, volunteers, and anyone else you can think of to thank.

Send press release to community media about projects that will be moving forward to gather more community support and volunteers. Include photos. Use social media to do the same.

Encourage participants to join Facebook group for the workshop if they haven't done so already.

