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ABSTRACT

This set of flowcharts was designed for use with the companion volume, "How to Conduct a Workshop," a detailed guide describing prccedures for organizing and managing an inservice workshop. Based on extensive workshop experience of the Eastern Regional Institute for Education (ERIE), these flowcharts are intended to help any educator who is faced with the task of planning and conducting a workshop, whatever the size. The key features of the flowcharts are 1) Each task is written in generalized form in order to be useful in conducting any workshop. 2) Each task is written in the form of a behavioral action statement. 3) Each workshop task is enclosed within a rectangle, the direction in which the symbol points indicated whether it is a "lead out" or "lead in" item. Two key letters inside the symbol indicate the inter-flowchart references. The flowcharts concern instructional programs, funding and costs, staffing materials, scheduling, site logistics, microteaching, publicity and registration, college credit procedures, non-instructional activities and evaluation. (Related document is SP 005 813.) (Author/MJM)

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A series of eleven flowcharts to be used with How to Conduct a Workshop

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FLOWCHARTS

HOW TO CONDUCT A WORKSHOP

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May 1970

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INTRODUCTION

This set of flowcharts was designed for use with the companion volume, How to Conduct a Workshop, a detailed guide describing procedures for organizing and managing an inservice workshop. Based on extensive workshop experience of the Eastern Regional Institute for Education (ERIE), these flowcharts are intended to help any educator who is faced with the task of planning and conducting a workshop, whatever the size.

Despite the diversity, all workshops bear certain commonalities. Large or small, the workshop must have an appropriate site, a well-defined instructional program, and suitable instructional materials. The planner of even the most modest workshop needs to be aware of the full set of workshop planning tasks. Only then can he intelligently discard the tasks that are impractical or unnecessary for his situation. In large, complex workshops, the director will want to assign responsibility for planning specific workshop components to staff associates. In this case, each flowchart would serve as a well-defined set of tasks for the workshop component.

Each workshop component is presented in the flowchart as a set of behaviorally-stated tasks, arranged in a numbered sequence to designate the order in which tasks are

to be accomplished. Milestone tasks are presented on the frames with a heavy double outline.

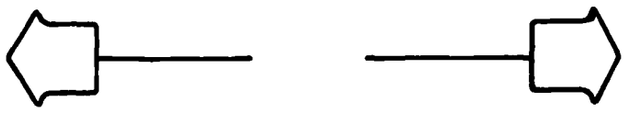
Among the key features of the flowcharts are the following:

1. Each task is written in generalized form; that is, although the ERIE experience upon which this document is based came in the form of elementary science workshops, each task is written so as to be potentially useful in conducting any workshop, regardless of size or content.

2. Each task is written in the form of a behavioral action statement. As such, each statement represents a task to be accomplished; it does not attempt to designate who is to do it.

   Science--A Process Approach (1967-69), the curriculum upon which ERIE's workshop experience is based, is a program built upon behaviorally-stated educational objectives. For that reason, the writers of this document specify each task in behavioral terms. The verb of each statement has been capitalized for emphasis. To the greatest extent possible, use of verbs is restricted to the AAAS list of "action words."*

3. Each workshop task is enclosed within a rectangle. References between flowcharts are made by directional symbols as follows:



LEAD OUT REFERENCE LEAD IN REFERENCE

The direction in which the symbol points relative to its frame indicates whether it is a "lead out" or "lead in" item.

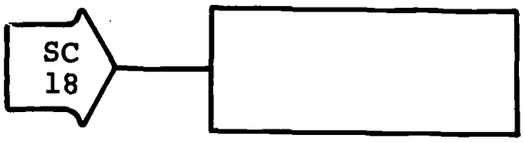
*See AAAS Guide for Inservice Instruction (pp. 32-45).

The two letters written inside the symbol indicate the related flowchart, according to the following key:

KEY FOR INTER-FLOWCHART REFERENCES

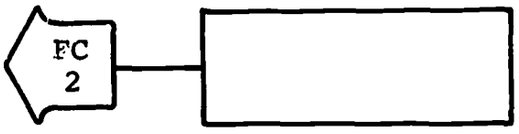
Symbol	Flowchart
IP	Instructional Program
FC	Funding and Costs
ST	Staffing
MA	Materials
SC	Scheduling
SL	Site Logistics
MT	Micro-Teaching
PR	Publicity and Registration
CC	College Credit Procedures
NI	Non-Instructional Activities
EV	Evaluation

Thus, the symbol



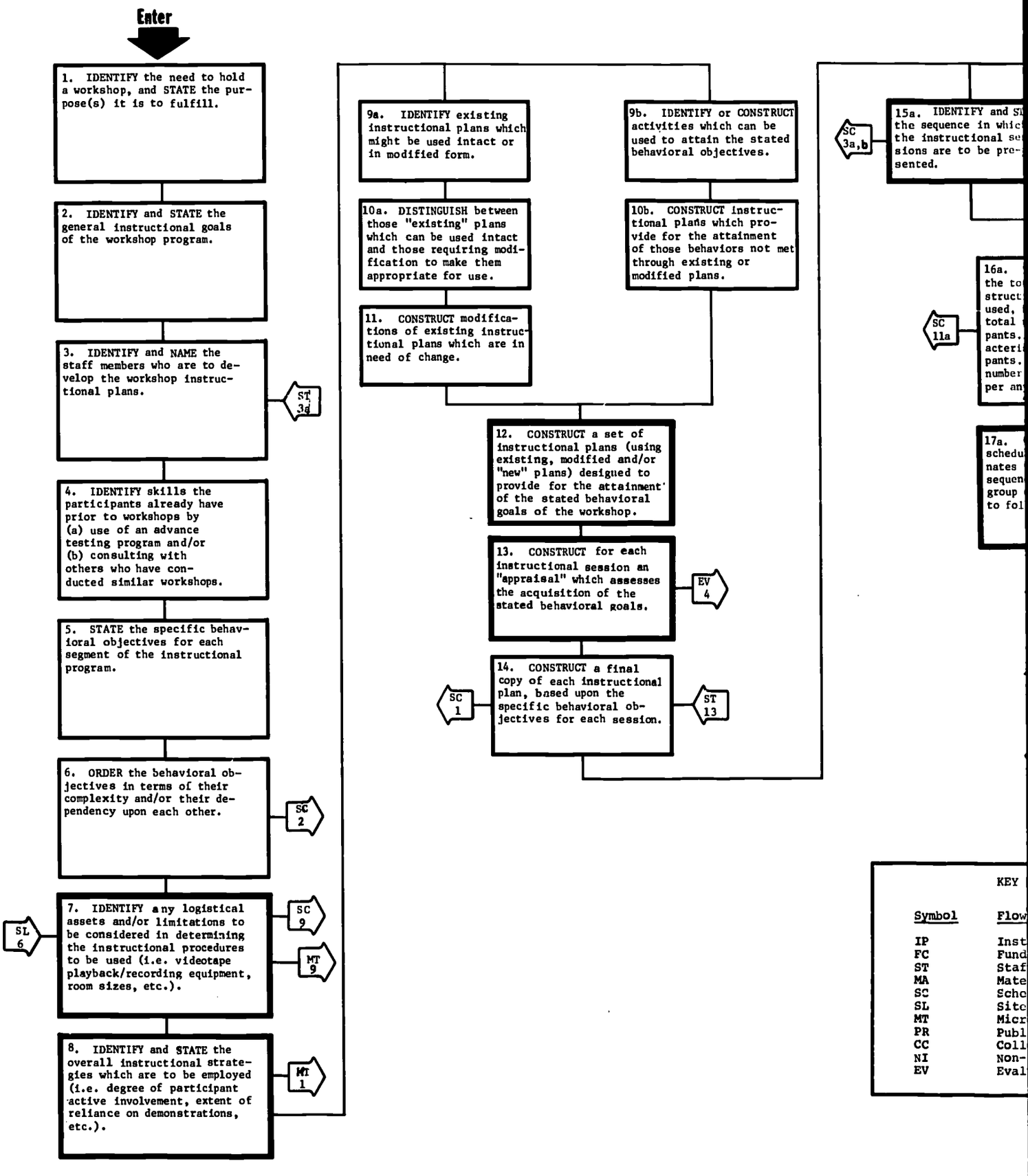
indicates a "lead-in" to the task in question FROM the Scheduling Flowchart, Item 18.

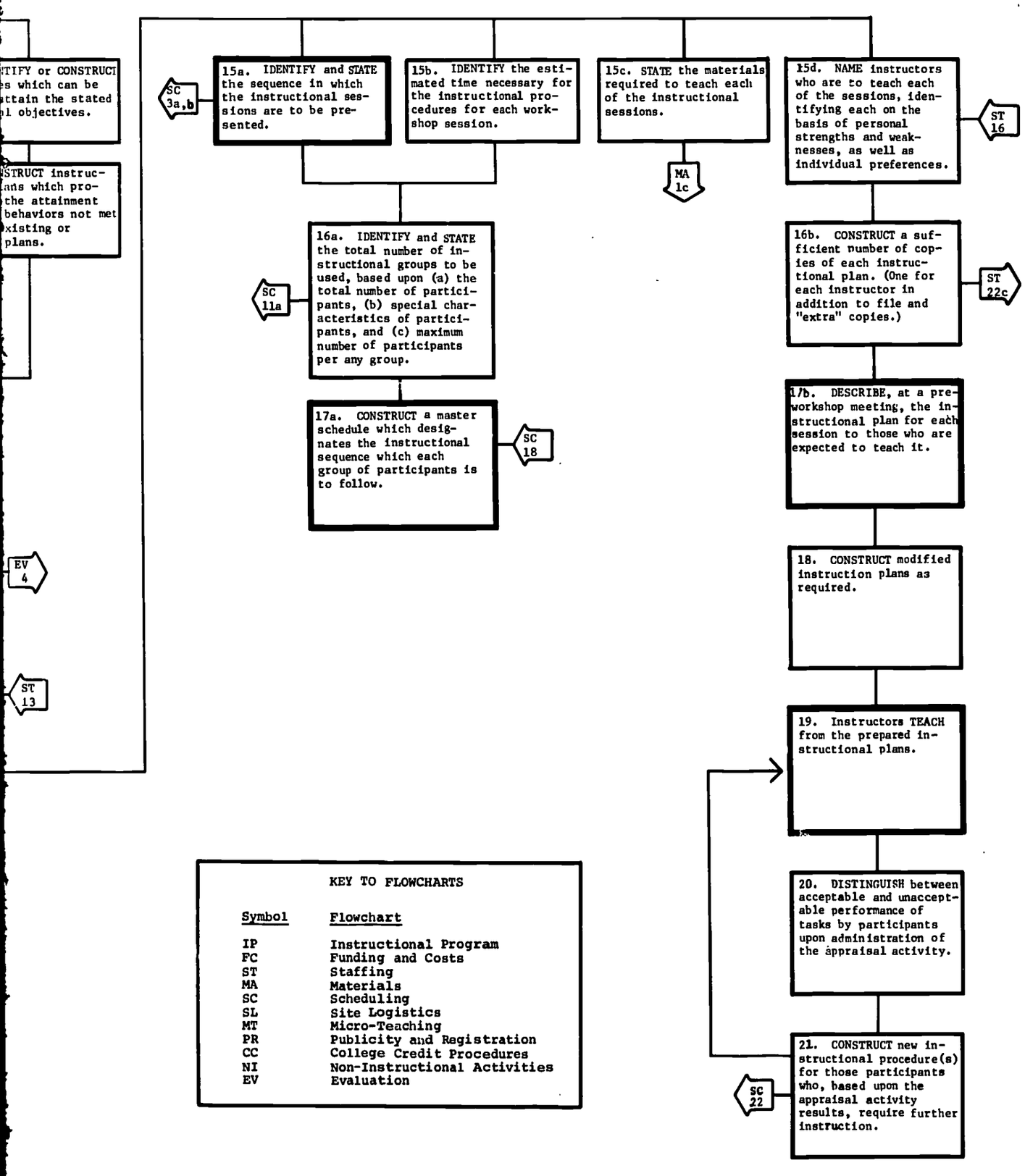
On the other hand, the designation,



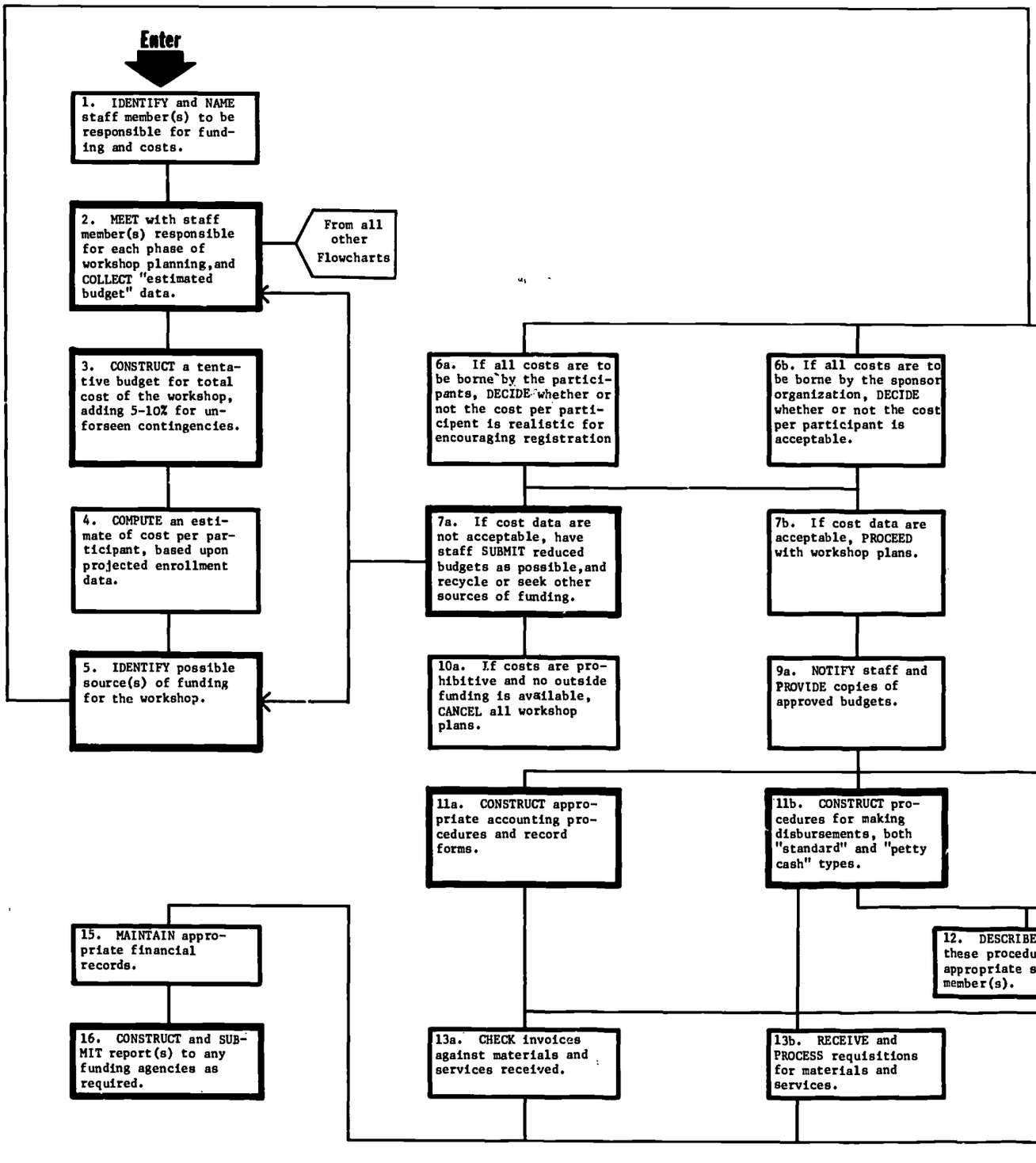
indicates a "lead-out" reference. The reader should REFER TO the Funding and Cost Flowchart, Item 2.

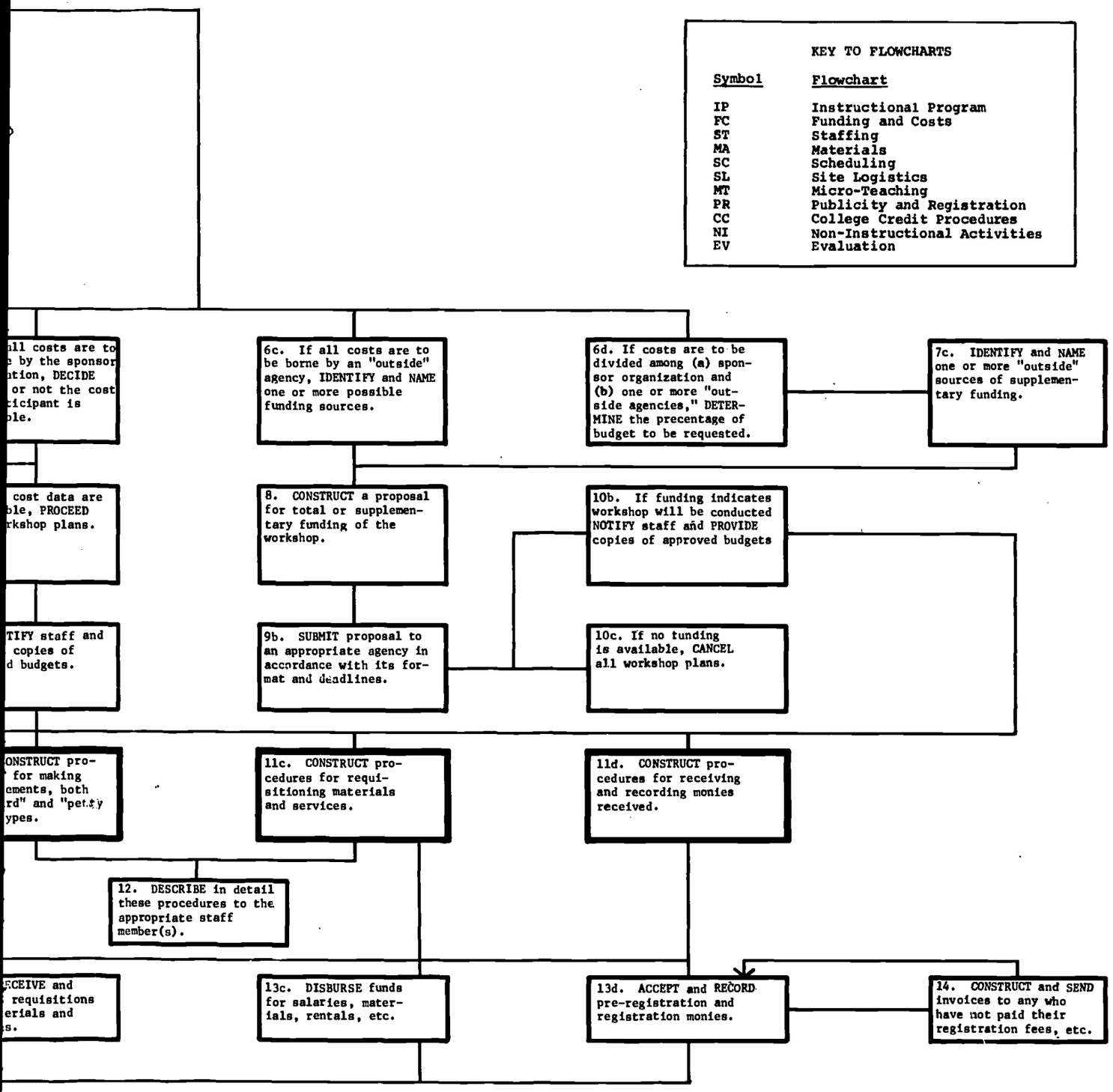
IP—INSTRUCTIONAL PROGRAM




TIFY or CONSTRUCT
s which can be
ttain the stated
l objectives.
STRUCT instruc-
ans which pro-
the attainment
behaviors not met
xisting or
plans.
EV 4
ST 13
SC 3a,b
15a. IDENTIFY and STATE the sequence in which the instructional sessions are to be presented.
15b. IDENTIFY the estimated time necessary for the instructional procedures for each workshop session.
15c. STATE the materials required to teach each of the instructional sessions.
MA 1c
15d. NAME instructors who are to teach each of the sessions, identifying each on the basis of personal strengths and weaknesses, as well as individual preferences.
ST 16
SC 11a
16a. IDENTIFY and STATE the total number of instructional groups to be used, based upon (a) the total number of participants, (b) special characteristics of participants, and (c) maximum number of participants per any group.
16b. CONSTRUCT a sufficient number of copies of each instructional plan. (One for each instructor in addition to file and "extra" copies.)
ST 22c
17a. CONSTRUCT a master schedule which designates the instructional sequence which each group of participants is to follow.
SC 18
17b. DESCRIBE, at a preworkshop meeting, the instructional plan for each session to those who are expected to teach it.
18. CONSTRUCT modified instruction plans as required.
19. Instructors TEACH from the prepared instructional plans.
20. DISTINGUISH between acceptable and unacceptable performance of tasks by participants upon administration of the appraisal activity.
21. CONSTRUCT new instructional procedure(s) for those participants who, based upon the appraisal activity results, require further instruction.
SC 22
KEY TO FLOWCHARTS
Symbol Flowchart
IP Instructional Program
FC Funding and Costs
ST Staffing
MA Materials
SC Scheduling
SL Site Logistics
MT Micro-Teaching
PR Publicity and Registration
CC College Credit Procedures
NI Non-Instructional Activities
EV Evaluation

FC–FUNDING AND COSTS

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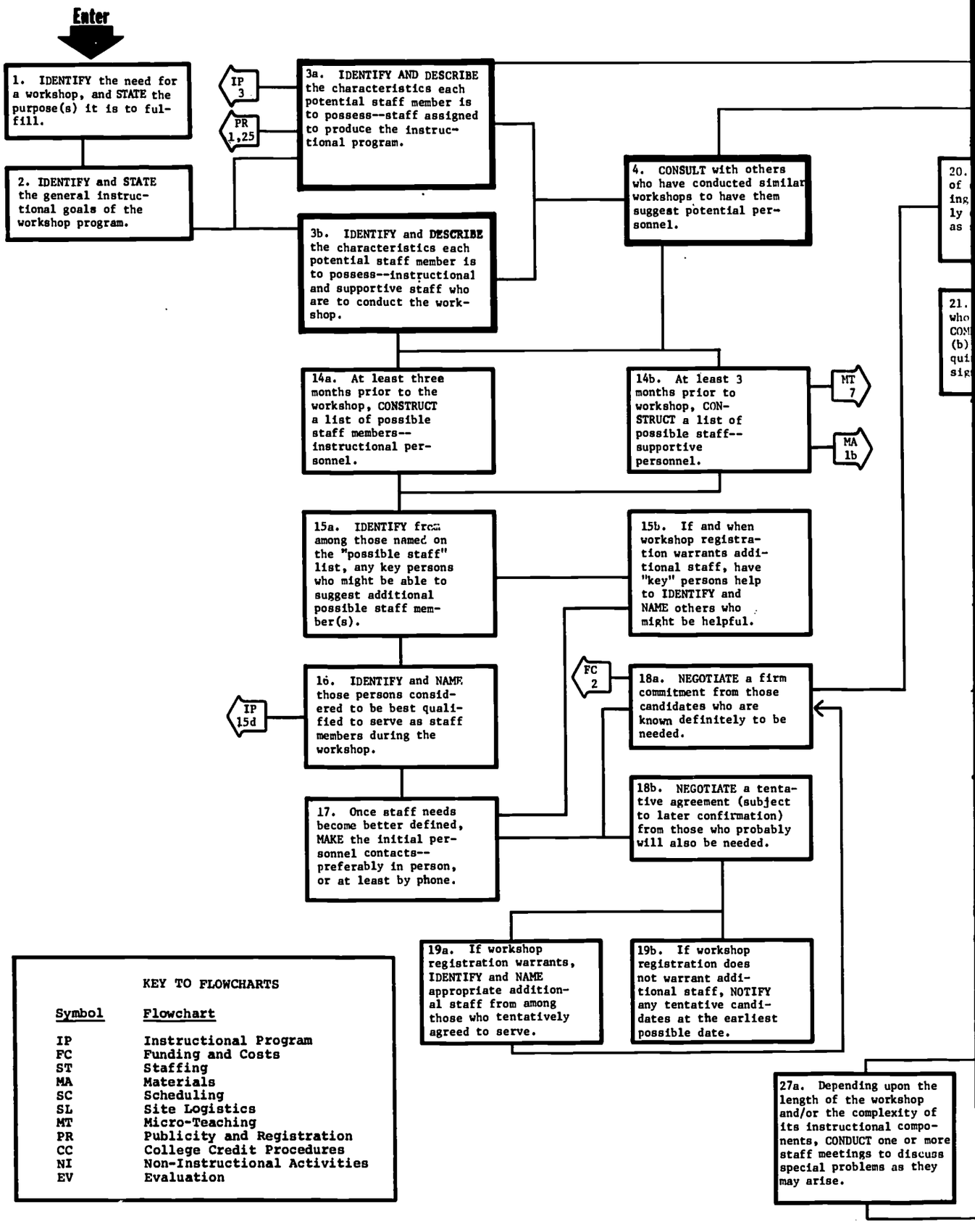
EV Evaluation
ll costs are to by the sponsor tion, DECIDE or not the cost ticipant is ble.
6c. If all costs are to be borne by an "outside" agency, IDENTIFY and NAME one or more possible funding sources.
6d. If costs are to be divided among (a) sponsor organization and (b) one or more "outside agencies," DETERMINE the precentage of budget to be requested.
7c. IDENTIFY and NAME one or more "outside" sources of supplementary funding.
cost data are ble, PROCEED rkshop plans.
8. CONSTRUCT a proposal for total or supplementary funding of the workshop.
10b. If funding indicates workshop will be conducted NOTIFY staff and PROVIDE copies of approved budgets
TIFY staff and copies of d budgets.
9b. SUBMIT proposal to an appropriate agency in accordance with its format and deadlines.
10c. If no funding is available, CANCEL all workshop plans.
ONSTRUCT pro- for making ements, both rd" and "petty ypes.
11c. CONSTRUCT procedures for requisitioning materials and services.
11d. CONSTRUCT procedures for receiving and recording monies received.
12. DESCRIBE in detail these procedures to the appropriate staff member(s).
ECEIVE and requisitions erials and s.
13c. DISBURSE funds for salaries, materials, rentals, etc.
13d. ACCEPT and RECORD pre-registration and registration monies.
14. CONSTRUCT and SEND invoices to any who have not paid their registration fees, etc.

ST–STAFFING



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Symbol	Flowchart
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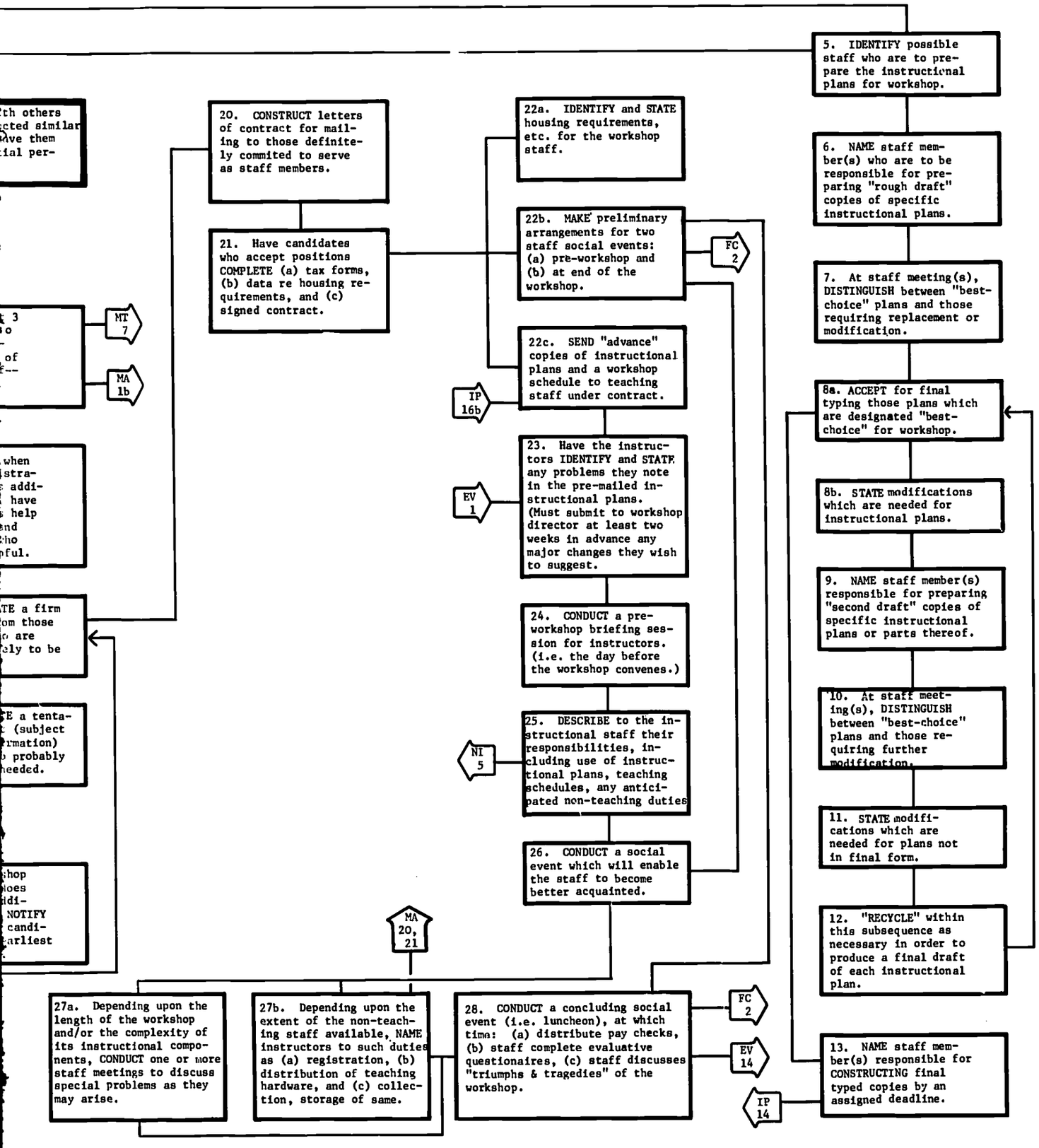
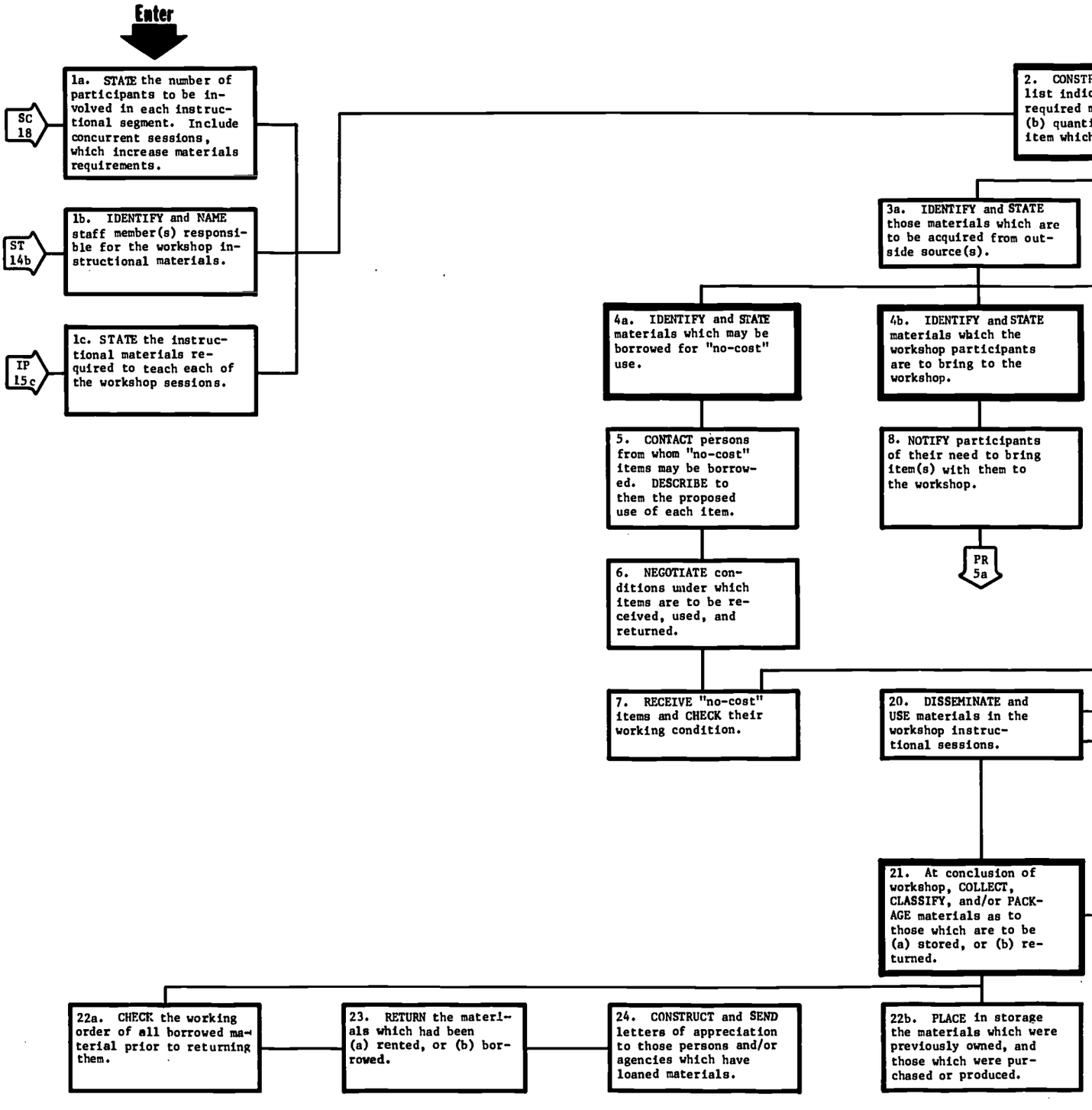
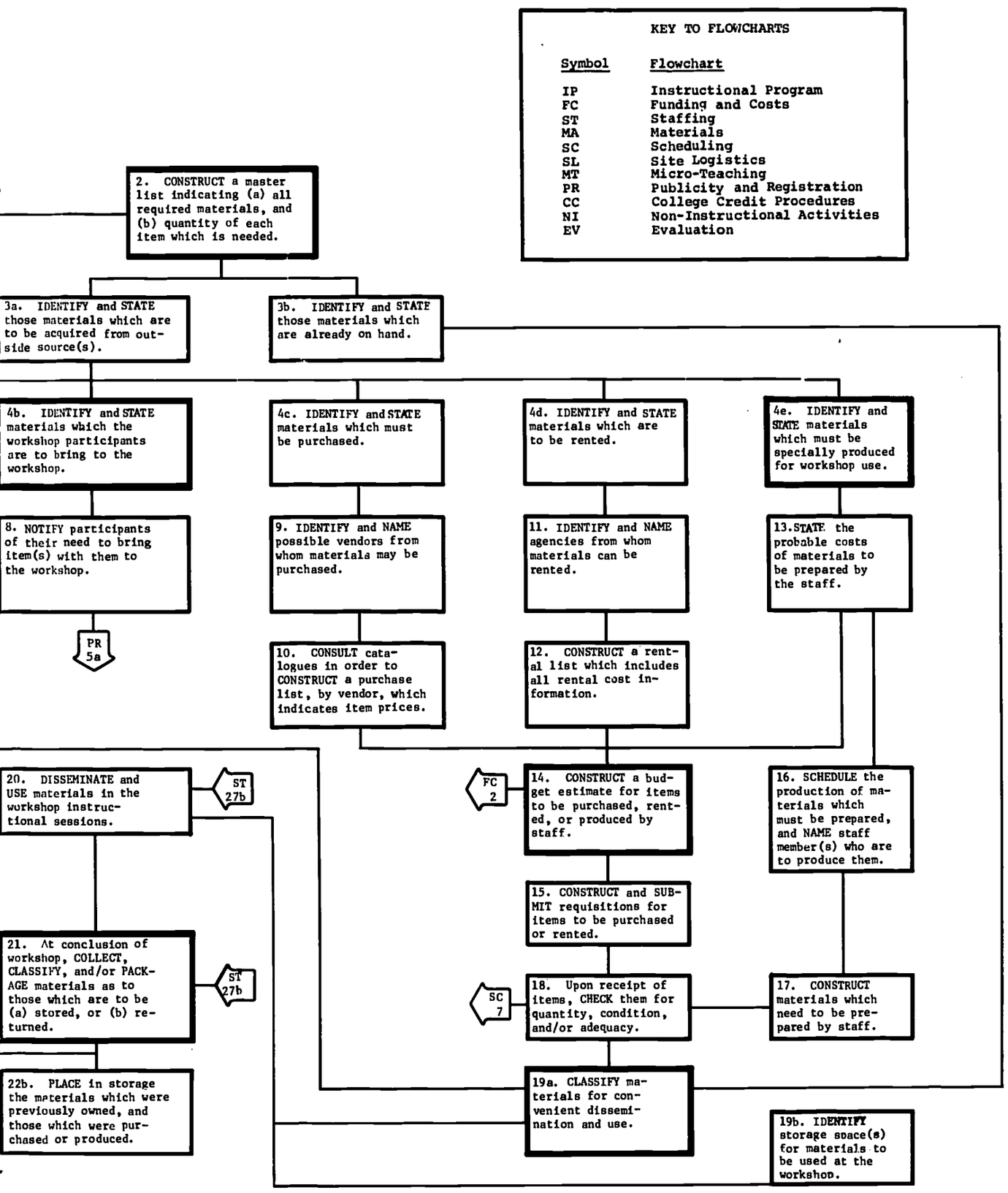

5. IDENTIFY possible staff who are to prepare the instructional plans for workshop.
6. NAME staff member(s) who are to be responsible for preparing "rough draft" copies of specific instructional plans.
7. At staff meeting(s), DISTINGUISH between "best-choice" plans and those requiring replacement or modification.
8a. ACCEPT for final typing those plans which are designated "best-choice" for workshop.
8b. STATE modifications which are needed for instructional plans.
9. NAME staff member(s) responsible for preparing "second draft" copies of specific instructional plans or parts thereof.
10. At staff meeting(s), DISTINGUISH between "best-choice" plans and those requiring further modification.
11. STATE modifications which are needed for plans not in final form.
12. "RECYCLE" within this subsequence as necessary in order to produce a final draft of each instructional plan.
13. NAME staff member(s) responsible for CONSTRUCTING final typed copies by an assigned deadline.
IP 14
EV 14
FC 2
28. CONDUCT a concluding social event (i.e. luncheon), at which time: (a) distribute pay checks, (b) staff complete evaluative questionaires, (c) staff discusses "triumphs & tragedies" of the workshop.
27a. Depending upon the length of the workshop and/or the complexity of its instructional components, CONDUCT one or more staff meetings to discuss special problems as they may arise.
27b. Depending upon the extent of the non-teaching staff available, NAME instructors to such duties as (a) registration, (b) distribution of teaching hardware, and (c) collection, storage of same.
MA 20, 21
26. CONDUCT a social event which will enable the staff to become better acquainted.
25. DESCRIBE to the instructional staff their responsibilities, including use of instructional plans, teaching schedules, any anticipated non-teaching duties
NI 5
24. CONDUCT a pre-workshop briefing session for instructors. (i.e. the day before the workshop convenes.)
23. Have the instructors IDENTIFY and STATE any problems they note in the pre-mailed instructional plans. (Must submit to workshop director at least two weeks in advance any major changes they wish to suggest.
EV 1
IP 16b
22c. SEND "advance" copies of instructional plans and a workshop schedule to teaching staff under contract.
22b. MAKE preliminary arrangements for two staff social events: (a) pre-workshop and (b) at end of the workshop.
FC 2
22a. IDENTIFY and STATE housing requirements, etc. for the workshop staff.
21. Have candidates who accept positions COMPLETE (a) tax forms, (b) data re housing requirements, and (c) signed contract.
20. CONSTRUCT letters of contract for mailing to those definitely commited to serve as staff members.
MA 1b
MT 7

MA–MATERIALS

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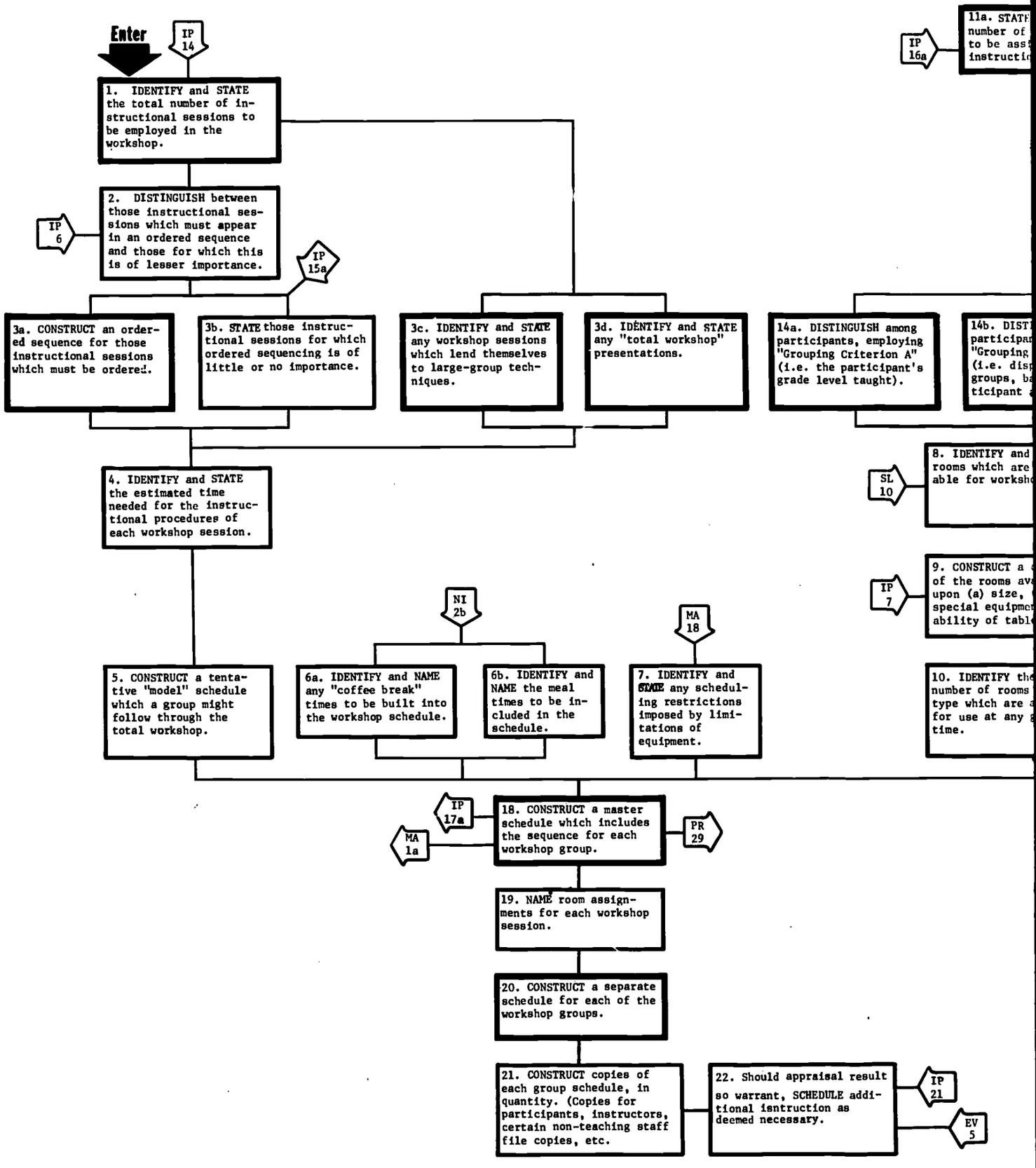
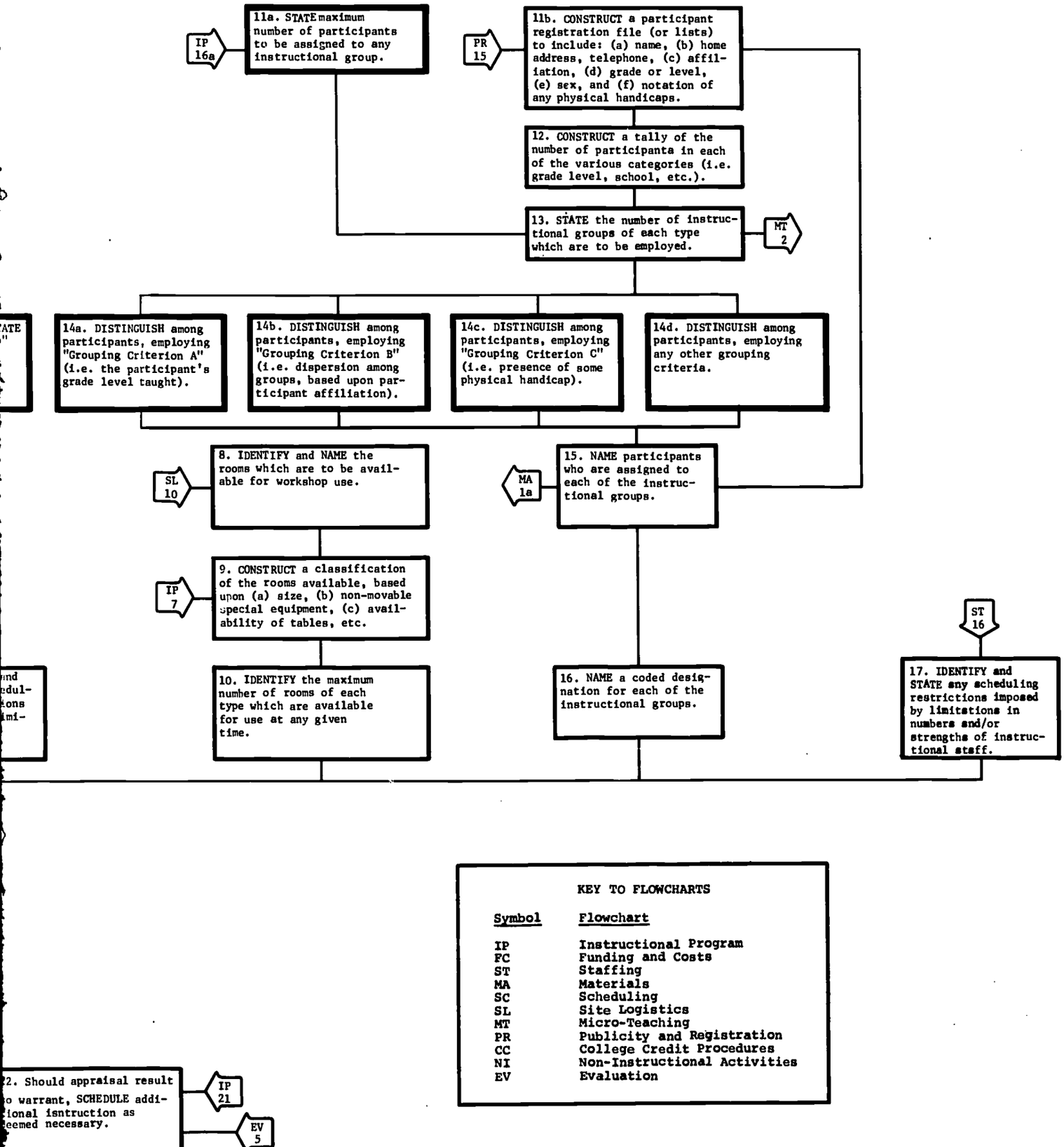
EV Evaluation
2. CONSTRUCT a master list indicating (a) all required materials, and (b) quantity of each item which is needed.
3a. IDENTIFY and STATE those materials which are to be acquired from outside source(s).
3b. IDENTIFY and STATE those materials which are already on hand.
4b. IDENTIFY and STATE materials which the workshop participants are to bring to the workshop.
4c. IDENTIFY and STATE materials which must be purchased.
4d. IDENTIFY and STATE materials which are to be rented.
4e. IDENTIFY and STATE materials which must be specially produced for workshop use.
8. NOTIFY participants of their need to bring item(s) with them to the workshop.
9. IDENTIFY and NAME possible vendors from whom materials may be purchased.
11. IDENTIFY and NAME agencies from whom materials can be rented.
13. STATE the probable costs of materials to be prepared by the staff.
PR 5a
10. CONSULT catalogues in order to CONSTRUCT a purchase list, by vendor, which indicates item prices.
12. CONSTRUCT a rental list which includes all rental cost information.
20. DISSEMINATE and USE materials in the workshop instructional sessions.
ST 27b
FC 2
14. CONSTRUCT a budget estimate for items to be purchased, rented, or produced by staff.
16. SCHEDULE the production of materials which must be prepared, and NAME staff member(s) who are to produce them.
15. CONSTRUCT and SUBMIT requisitions for items to be purchased or rented.
21. At conclusion of workshop, COLLECT, CLASSIFY, and/or PACKAGE materials as to those which are to be (a) stored, or (b) returned.
ST 27b
SC 7
18. Upon receipt of items, CHECK them for quantity, condition, and/or adequacy.
17. CONSTRUCT materials which need to be prepared by staff.
22b. PLACE in storage the materials which were previously owned, and those which were purchased or produced.
19a. CLASSIFY materials for convenient dissemination and use.
19b. IDENTIFY storage space(s) for materials to be used at the workshop.

SC–SCHEDULING




IP 16a
11a. STATE maximum number of participants to be assigned to any instructional group.
PR 15
11b. CONSTRUCT a participant registration file (or lists) to include: (a) name, (b) home address, telephone, (c) affiliation, (d) grade or level, (e) sex, and (f) notation of any physical handicaps.
12. CONSTRUCT a tally of the number of participants in each of the various categories (i.e. grade level, school, etc.).
13. STATE the number of instructional groups of each type which are to be employed.
MT 2
14a. DISTINGUISH among participants, employing "Grouping Criterion A" (i.e. the participant's grade level taught).
14b. DISTINGUISH among participants, employing "Grouping Criterion B" (i.e. dispersion among groups, based upon participant affiliation).
14c. DISTINGUISH among participants, employing "Grouping Criterion C" (i.e. presence of some physical handicap).
14d. DISTINGUISH among participants, employing any other grouping criteria.
SL 10
8. IDENTIFY and NAME the rooms which are to be available for workshop use.
MA 1a
15. NAME participants who are assigned to each of the instructional groups.
IP 7
9. CONSTRUCT a classification of the rooms available, based upon (a) size, (b) non-movable special equipment, (c) availability of tables, etc.
ST 16
10. IDENTIFY the maximum number of rooms of each type which are available for use at any given time.
16. NAME a coded designation for each of the instructional groups.
17. IDENTIFY and STATE any scheduling restrictions imposed by limitations in numbers and/or strengths of instructional staff.
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Symbol Flowchart
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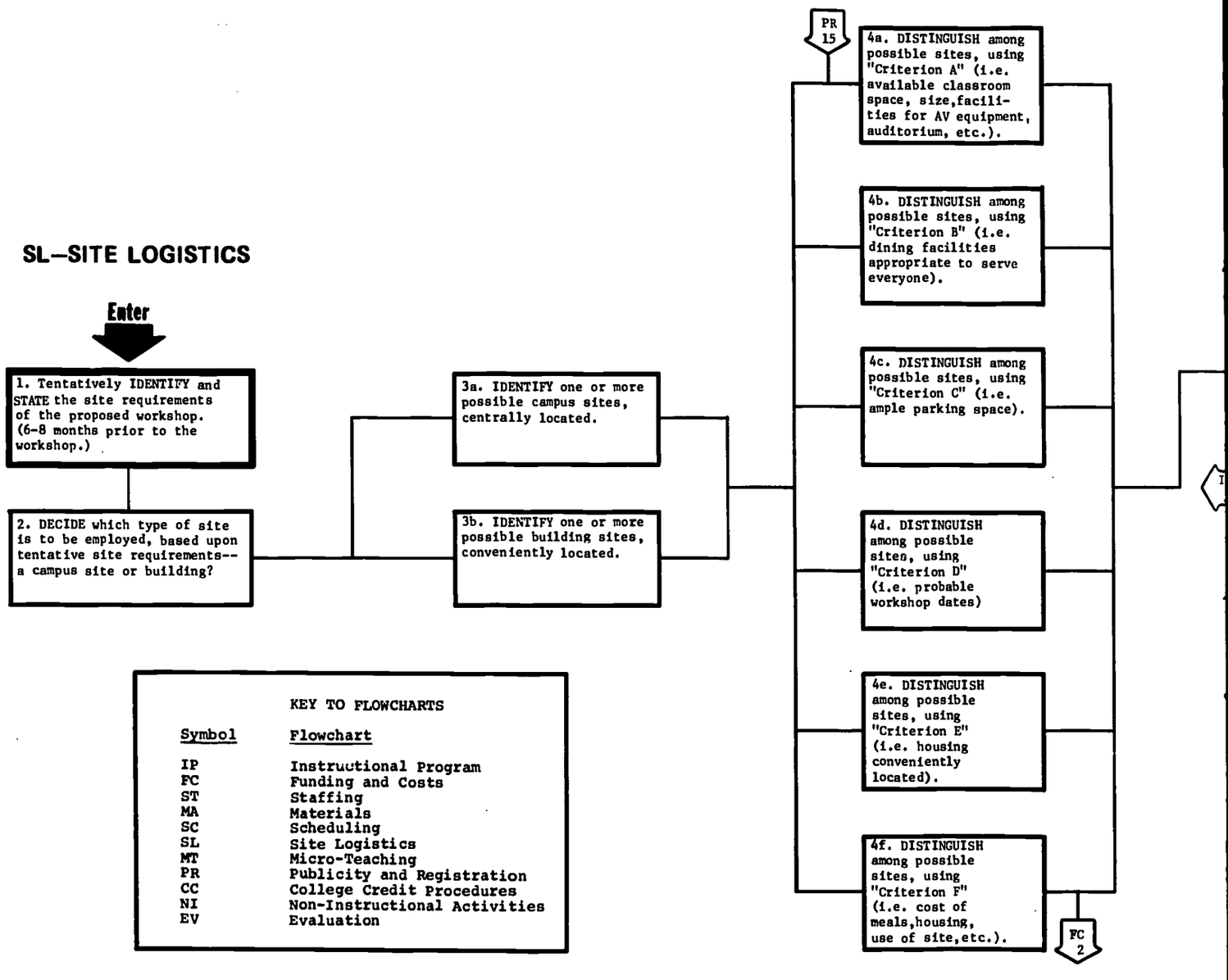
NI Non-Instructional Activities
EV Evaluation
2. Should appraisal result warrant, SCHEDULE additional isntruction as deemed necessary.
IP 21
EV 5

SL—SITE LOGISTICS



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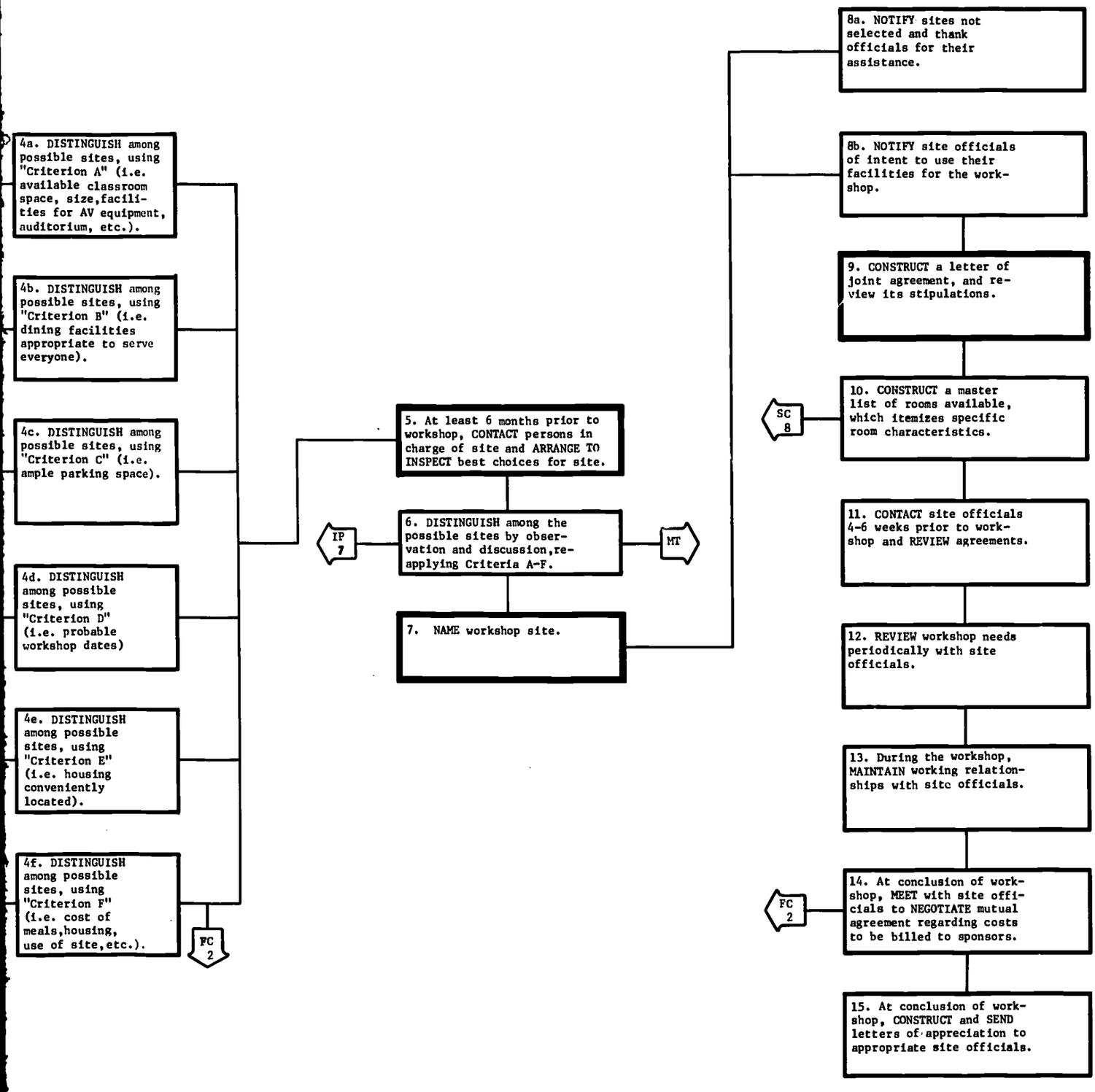
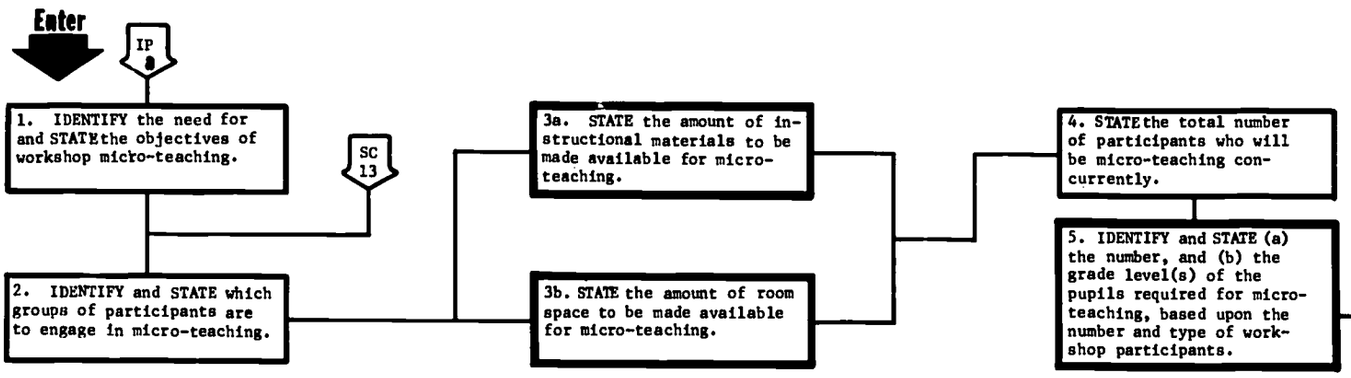

4a. DISTINGUISH among possible sites, using "Criterion A" (i.e. available classroom space, size, facilities for AV equipment, auditorium, etc.).
4b. DISTINGUISH among possible sites, using "Criterion B" (i.e. dining facilities appropriate to serve everyone).
4c. DISTINGUISH among possible sites, using "Criterion C" (i.e. ample parking space).
4d. DISTINGUISH among possible sites, using "Criterion D" (i.e. probable workshop dates)
4e. DISTINGUISH among possible sites, using "Criterion E" (i.e. housing conveniently located).
4f. DISTINGUISH among possible sites, using "Criterion F" (i.e. cost of meals, housing, use of site, etc.).
FC 2
5. At least 6 months prior to workshop, CONTACT persons in charge of site and ARRANGE TO INSPECT best choices for site.
IP 7
6. DISTINGUISH among the possible sites by observation and discussion, re-applying Criteria A-F.
MT
7. NAME workshop site.
8a. NOTIFY sites not selected and thank officials for their assistance.
8b. NOTIFY site officials of intent to use their facilities for the workshop.
9. CONSTRUCT a letter of joint agreement, and review its stipulations.
SC 8
10. CONSTRUCT a master list of rooms available, which itemizes specific room characteristics.
11. CONTACT site officials 4-6 weeks prior to workshop and REVIEW agreements.
12. REVIEW workshop needs periodically with site officials.
13. During the workshop, MAINTAIN working relationships with site officials.
FC 2
14. At conclusion of workshop, MEET with site officials to NEGOTIATE mutual agreement regarding costs to be billed to sponsors.
15. At conclusion of workshop, CONSTRUCT and SEND letters of appreciation to appropriate site officials.

MT—MICRO-TEACHING



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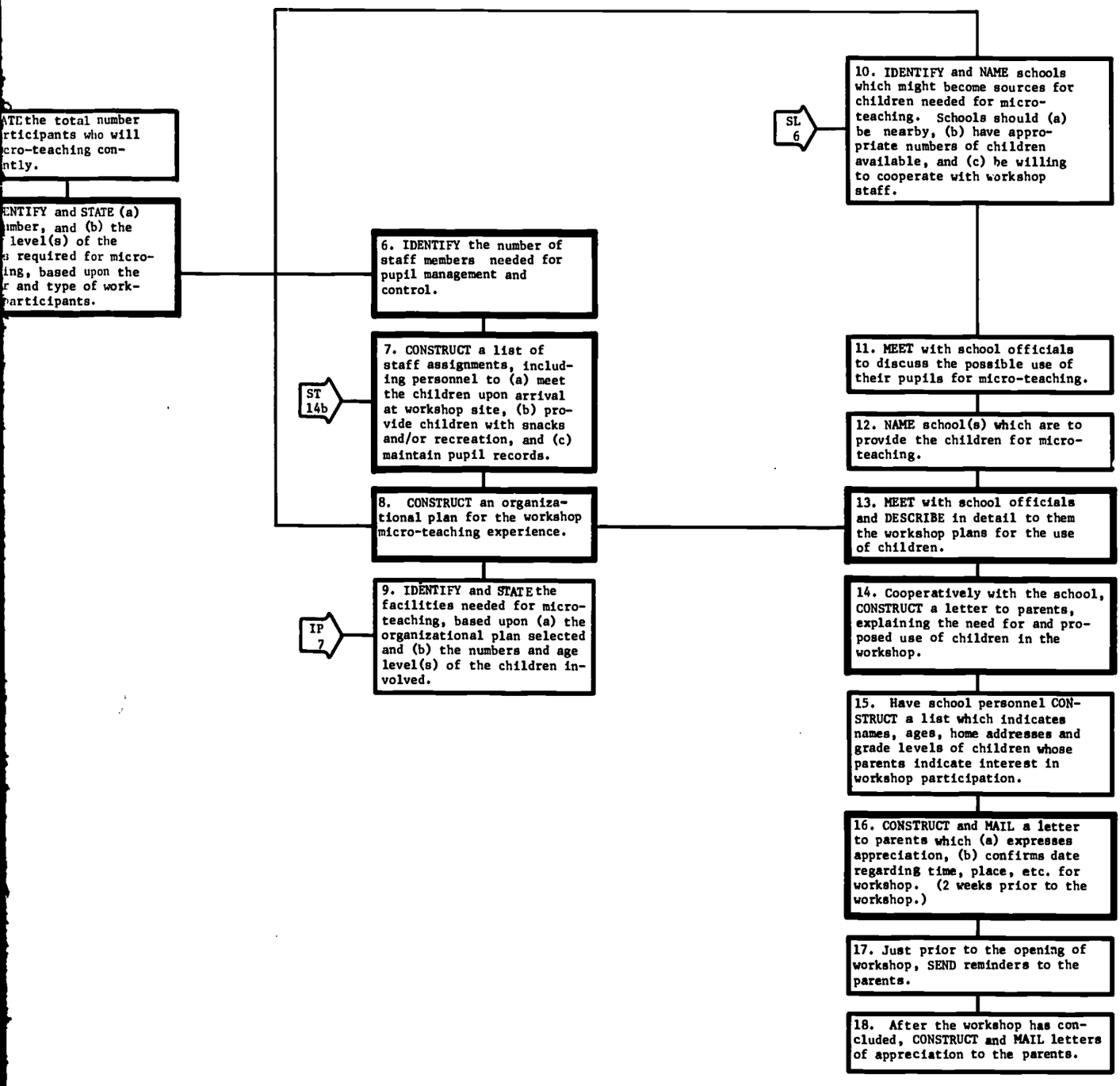
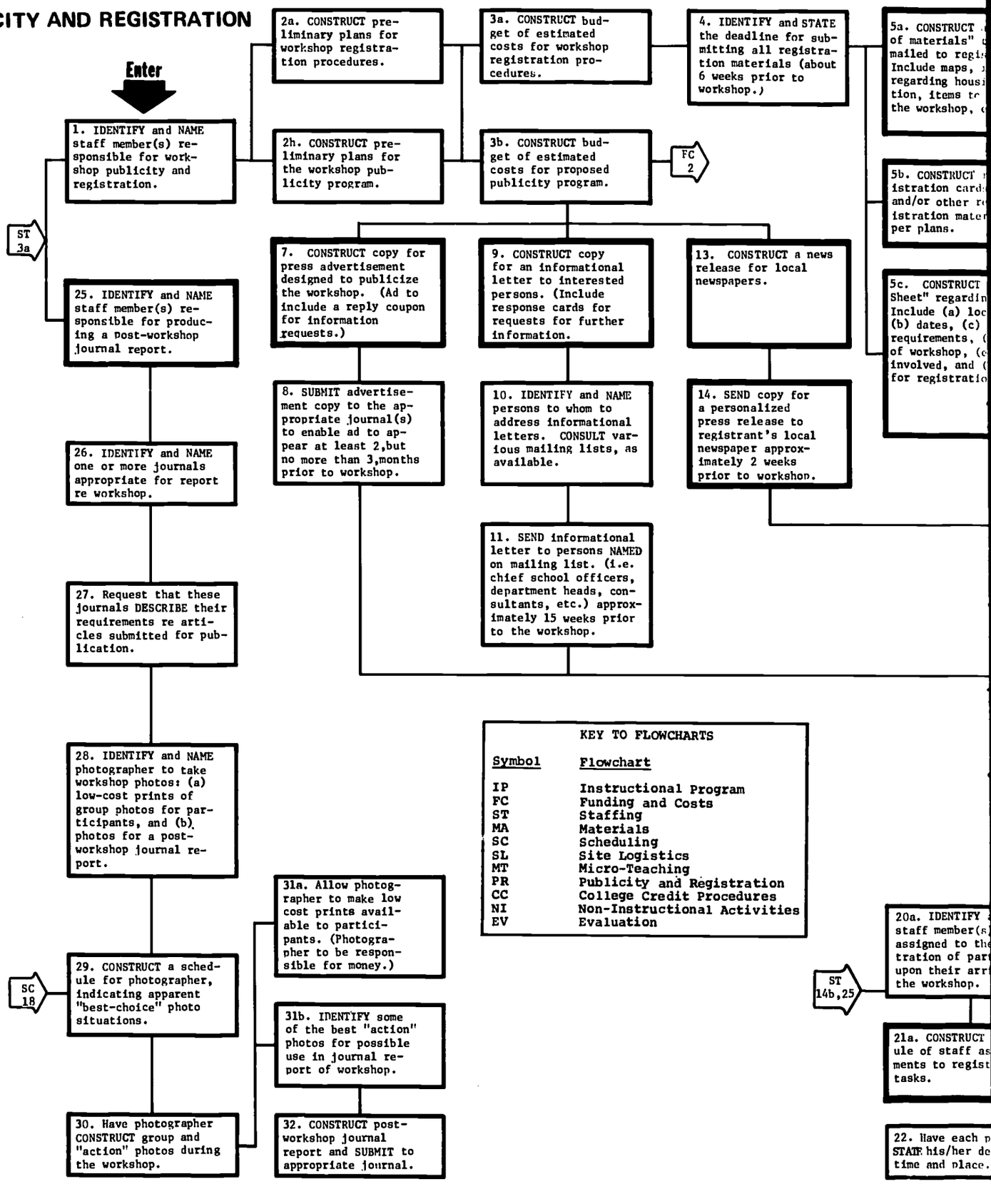
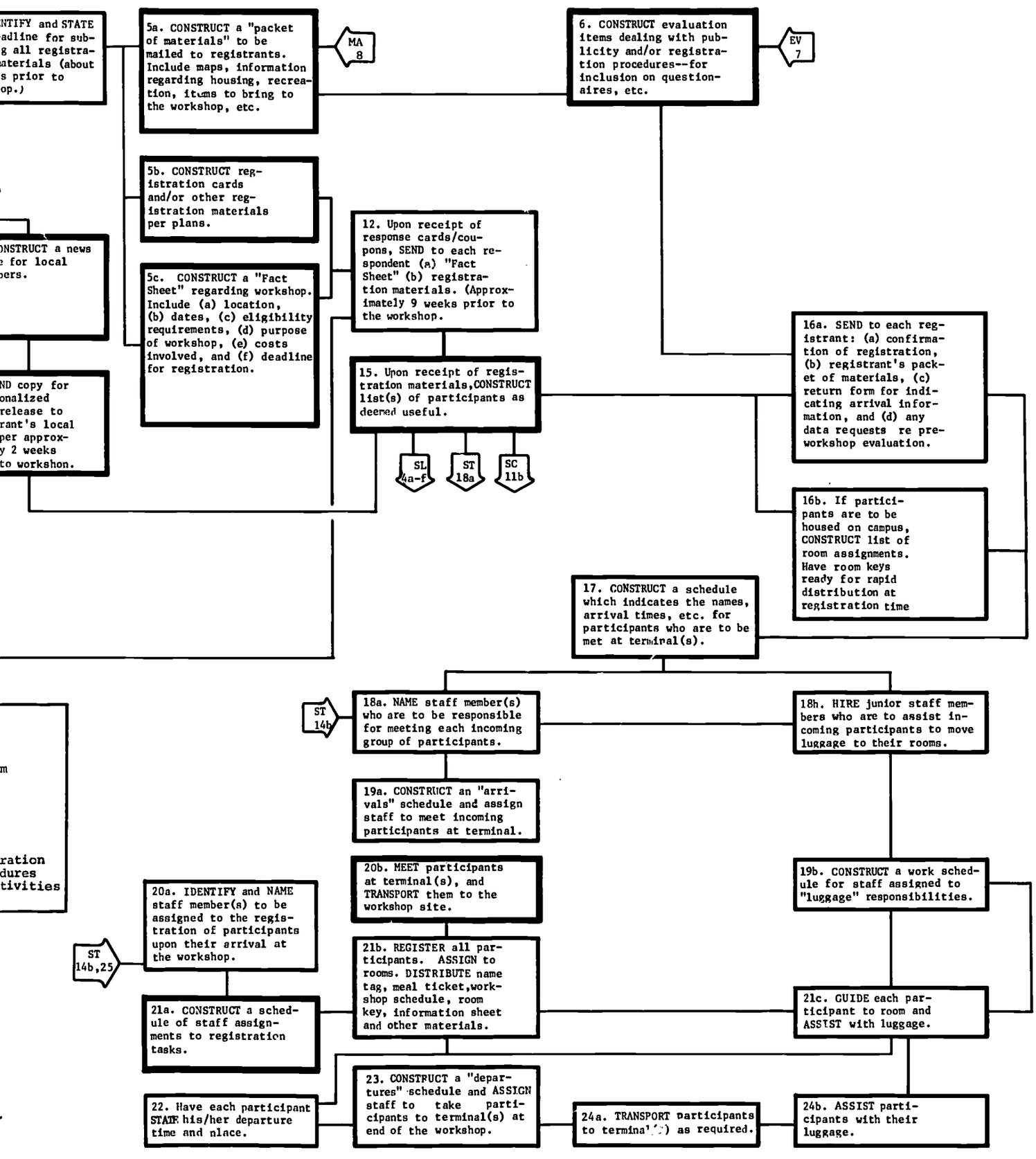
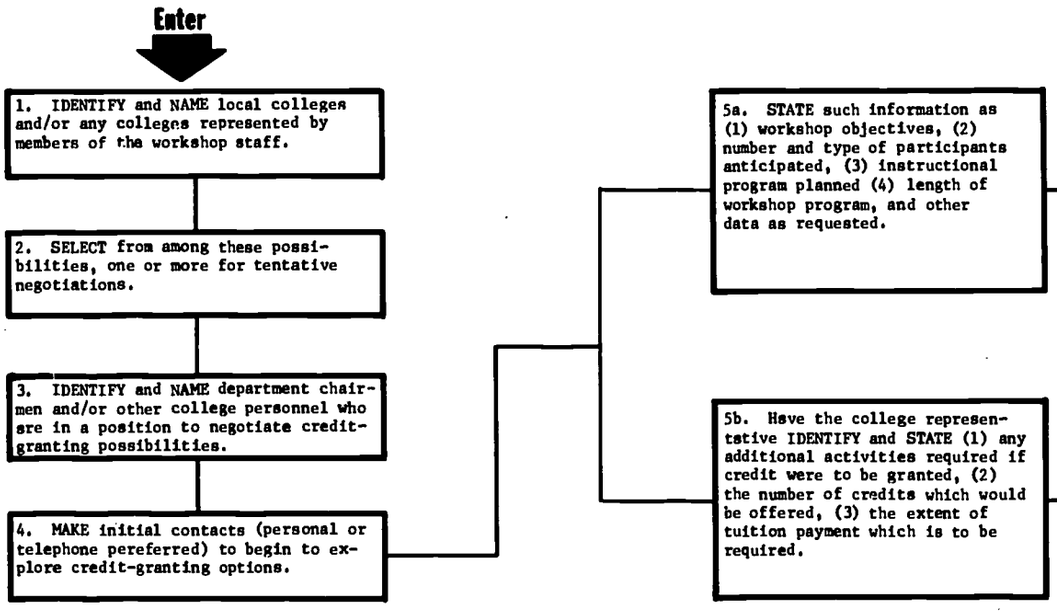

ATE the total number rticipants who will cro-teaching con- ntly.
ENTIFY and STATE (a) mber, and (b) the level(s) of the required for micro- ing, based upon the and type of work- articipants.
6. IDENTIFY the number of staff members needed for pupil management and control.
ST 14b
7. CONSTRUCT a list of staff assignments, including personnel to (a) meet the children upon arrival at workshop site, (b) provide children with snacks and/or recreation, and (c) maintain pupil records.
8. CONSTRUCT an organizational plan for the workshop micro-teaching experience.
IP 7
9. IDENTIFY and STATE the facilities needed for micro-teaching, based upon (a) the organizational plan selected and (b) the numbers and age level(s) of the children involved.
SL 6
10. IDENTIFY and NAME schools which might become sources for children needed for micro-teaching. Schools should (a) be nearby, (b) have appropriate numbers of children available, and (c) be willing to cooperate with workshop staff.
11. MEET with school officials to discuss the possible use of their pupils for micro-teaching.
12. NAME school(s) which are to provide the children for micro-teaching.
13. MEET with school officials and DESCRIBE in detail to them the workshop plans for the use of children.
14. Cooperatively with the school, CONSTRUCT a letter to parents, explaining the need for and proposed use of children in the workshop.
15. Have school personnel CONSTRUCT a list which indicates names, ages, home addresses and grade levels of children whose parents indicate interest in workshop participation.
16. CONSTRUCT and MAIL a letter to parents which (a) expresses appreciation, (b) confirms date regarding time, place, etc. for workshop. (2 weeks prior to the workshop.)
17. Just prior to the opening of workshop, SEND reminders to the parents.
18. After the workshop has concluded, CONSTRUCT and MAIL letters of appreciation to the parents.

PR–PUBLICITY AND REGISTRATION



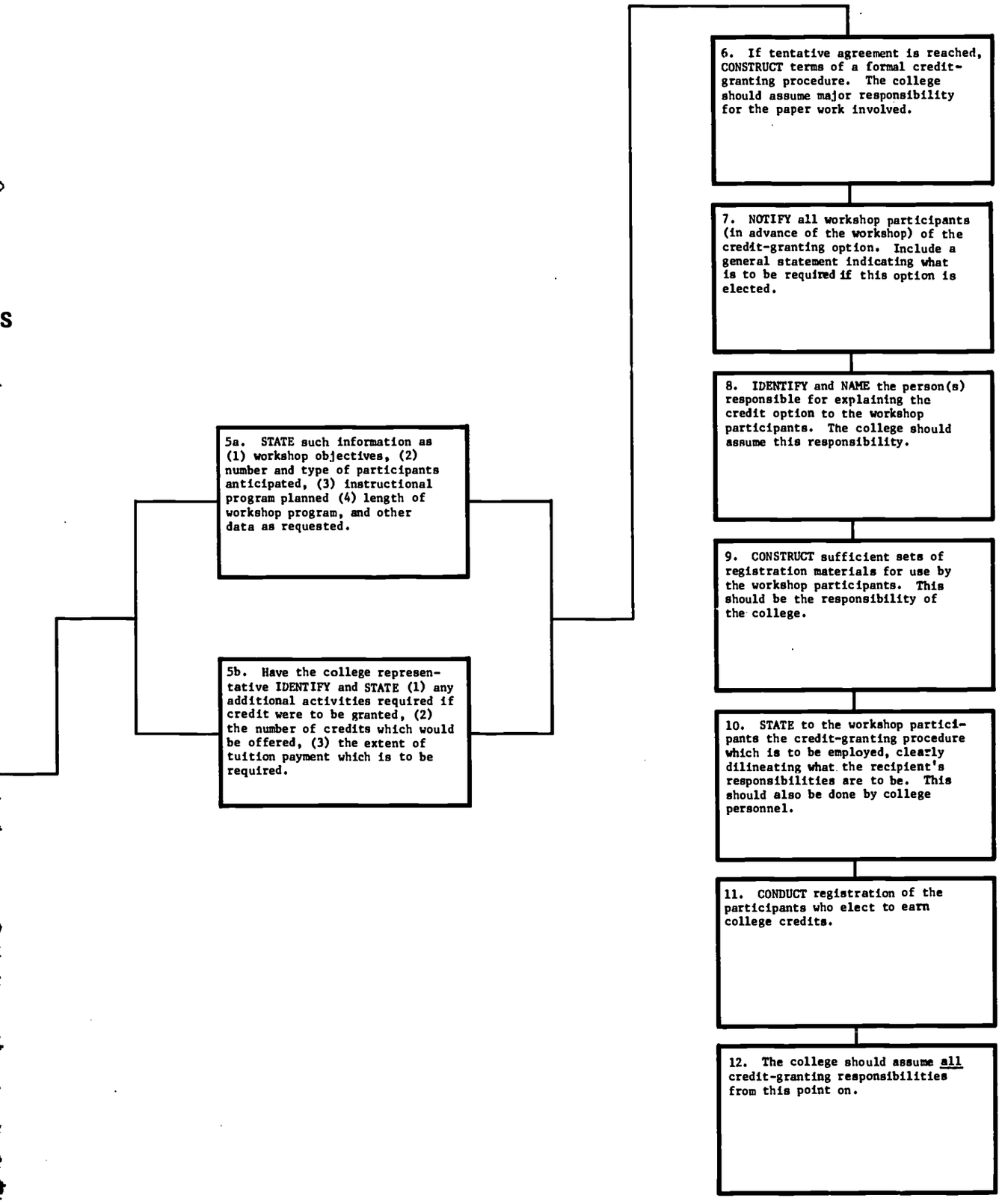

NTIFY and STATE adline for sub- g all registra- aterials (about s prior to op.)
5a. CONSTRUCT a "packet of materials" to be mailed to registrants. Include maps, information regarding housing, recreation, items to bring to the workshop, etc.
MA 8
6. CONSTRUCT evaluation items dealing with publicity and/or registration procedures--for inclusion on questionaires, etc.
EV 7
5b. CONSTRUCT registration cards and/or other registration materials per plans.
5c. CONSTRUCT a "Fact Sheet" regarding workshop. Include (a) location, (b) dates, (c) eligibility requirements, (d) purpose of workshop, (e) costs involved, and (f) deadline for registration.
12. Upon receipt of response cards/coupons, SEND to each respondent (a) "Fact Sheet" (b) registration materials. (Approximately 9 weeks prior to the workshop.
ONSTRUCT a news e for local bers.
ND copy for onalized release to rant's local per approx- y 2 weeks to workshon.
15. Upon receipt of registration materials,CONSTRUCT list(s) of participants as deemed useful.
SL 4a-f
ST 18a
SC 11b
16a. SEND to each registrant: (a) confirmation of registration, (b) registrant's packet of materials, (c) return form for indicating arrival information, and (d) any data requests re preworkshop evaluation.
16b. If participants are to be housed on campus, CONSTRUCT list of room assignments. Have room keys ready for rapid distribution at registration time
17. CONSTRUCT a schedule which indicates the names, arrival times, etc. for participants who are to be met at terminal(s).
ST 14b
18a. NAME staff member(s) who are to be responsible for meeting each incoming group of participants.
18h. HIRE junior staff members who are to assist incoming participants to move luggage to their rooms.
19a. CONSTRUCT an "arrivals" schedule and assign staff to meet incoming participants at terminal.
m
ration dures tivities
20b. MEET participants at terminal(s), and TRANSPORT them to the workshop site.
19b. CONSTRUCT a work schedule for staff assigned to "luggage" responsibilities.
ST 14b,25
20a. IDENTIFY and NAME staff member(s) to be assigned to the registration of participants upon their arrival at the workshop.
21b. REGISTER all participants. ASSIGN to rooms. DISTRIBUTE name tag, meal ticket,workshop schedule, room key, information sheet and other materials.
21a. CONSTRUCT a schedule of staff assignments to registration tasks.
21c. GUIDE each participant to room and ASSIST with luggage.
22. Have each participant STATE his/her departure time and place.
23. CONSTRUCT a "departures" schedule and ASSIGN staff to take participants to terminal(s) at end of the workshop.
24a. TRANSPORT participants to terminal(s) as required.
24b. ASSIST participants with their luggage.

CC—COLLEGE CREDIT PROCEDURES



KEY TO FLOWCHARTS

Symbol	Flowchart
IP	Instructional Program
FC	Funding and Costs
ST	Staffing
MA	Materials
SC	Scheduling
SL	Site Logistics
MT	Micro-Teaching
PR	Publicity and Registration
CC	College Credit Procedures
NI	Non-Instructional Activities
EV	Evaluation


5a. STATE such information as (1) workshop objectives, (2) number and type of participants anticipated, (3) instructional program planned (4) length of workshop program, and other data as requested.
5b. Have the college representative IDENTIFY and STATE (1) any additional activities required if credit were to be granted, (2) the number of credits which would be offered, (3) the extent of tuition payment which is to be required.
6. If tentative agreement is reached, CONSTRUCT terms of a formal credit-granting procedure. The college should assume major responsibility for the paper work involved.
7. NOTIFY all workshop participants (in advance of the workshop) of the credit-granting option. Include a general statement indicating what is to be required if this option is elected.
8. IDENTIFY and NAME the person(s) responsible for explaining the credit option to the workshop participants. The college should assume this responsibility.
9. CONSTRUCT sufficient sets of registration materials for use by the workshop participants. This should be the responsibility of the college.
10. STATE to the workshop participants the credit-granting procedure which is to be employed, clearly dilineating what the recipient's responsibilities are to be. This should also be done by college personnel.
11. CONDUCT registration of the participants who elect to earn college credits.
12. The college should assume all credit-granting responsibilities from this point on.

KEY TO FLOWCHARTS

Symbol	Flowchart
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CC	College Credit Procedures
NI	Non-Instructional Activities
EV	Evaluation

2a. IDENTIFY an
recreational po
which the selec
has to offer to
pants. (i.e. te
riding,bowling,
local tours of

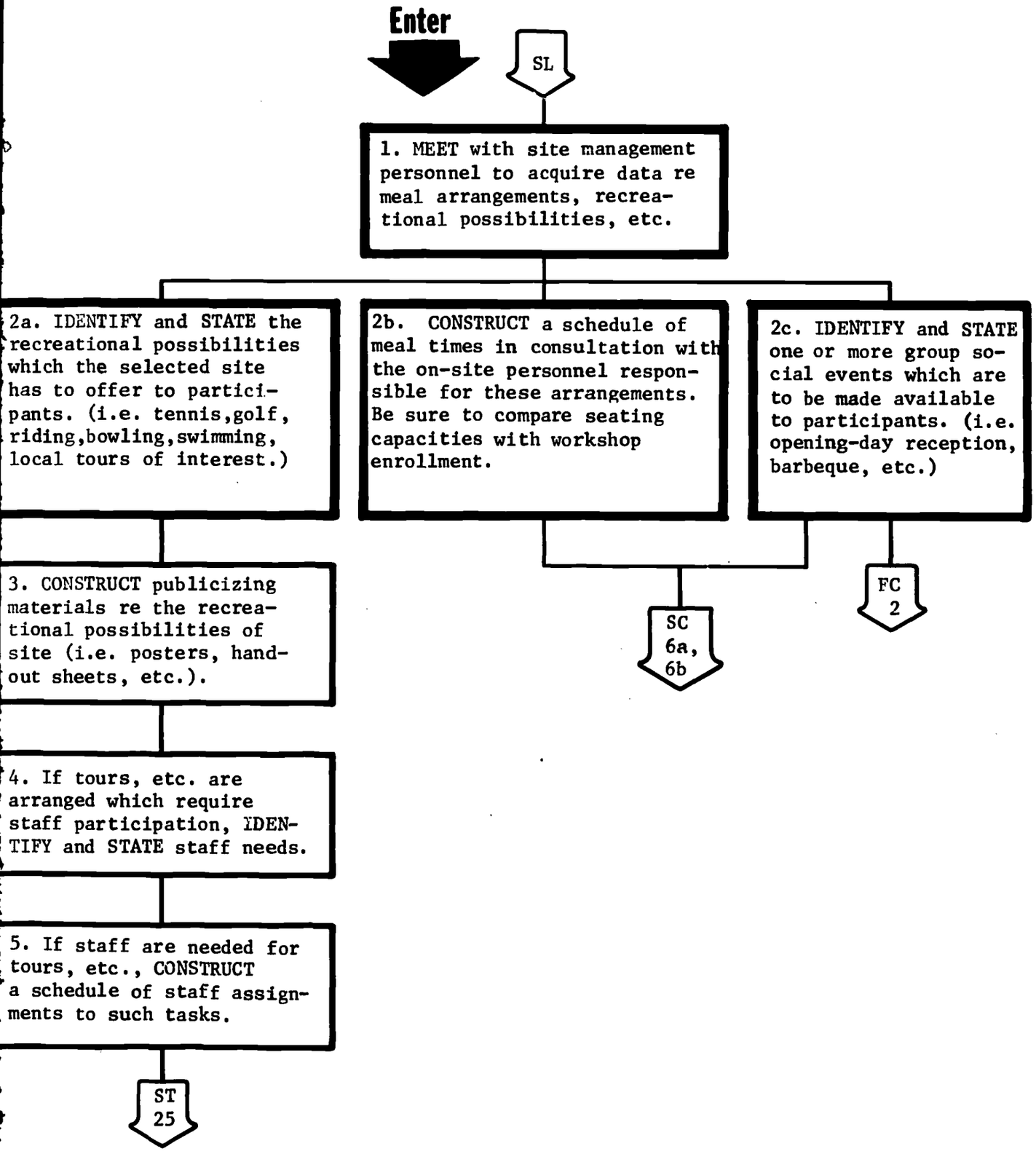
3. CONSTRUCT pu
materials re th
tional possibil
site (i.e. post
out sheets, etc

4. If tours, et
arranged which
staff participa
TIFY and STATE

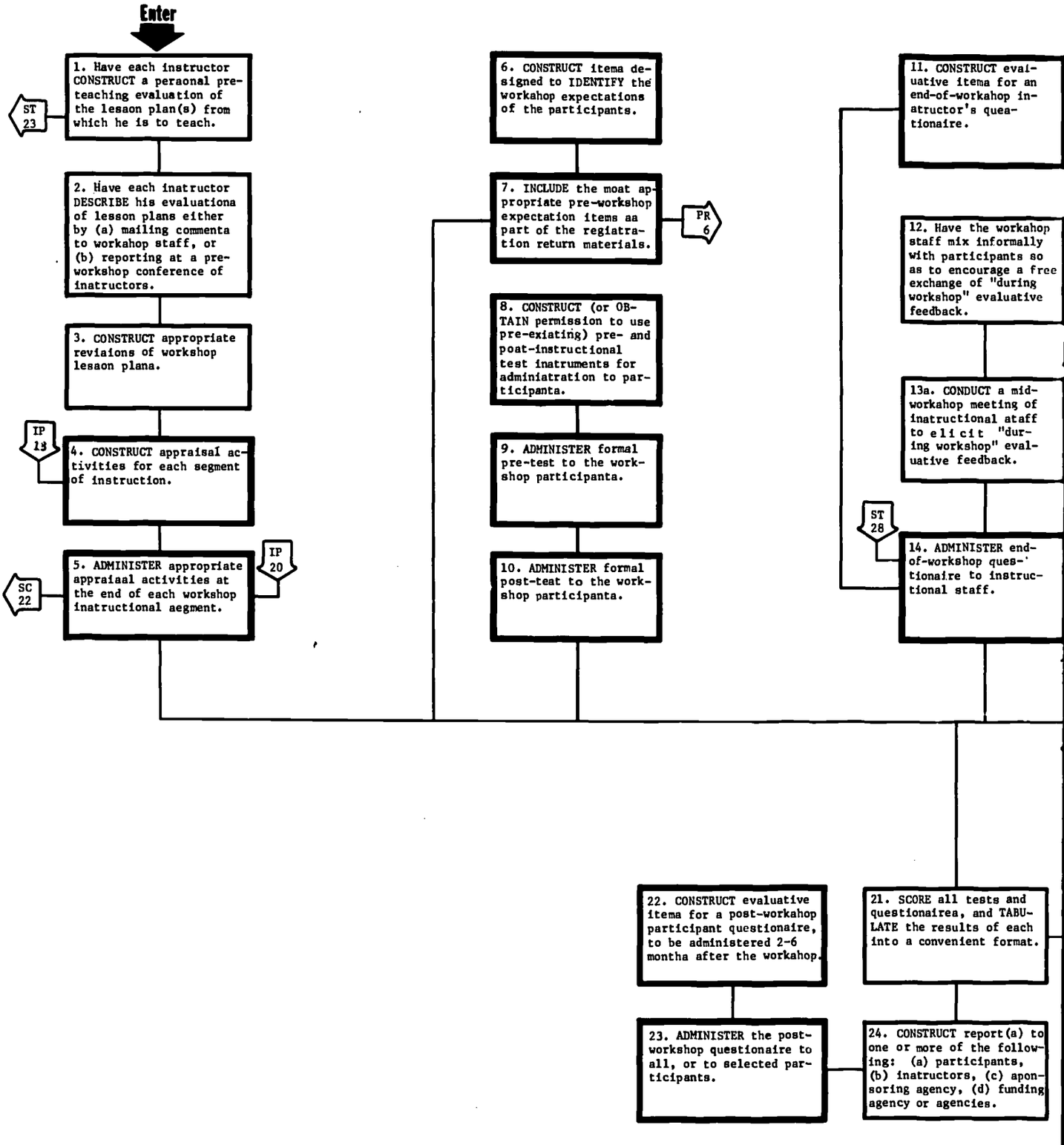
5. If staff are
tours, etc., CO
a schedule of
ments to such

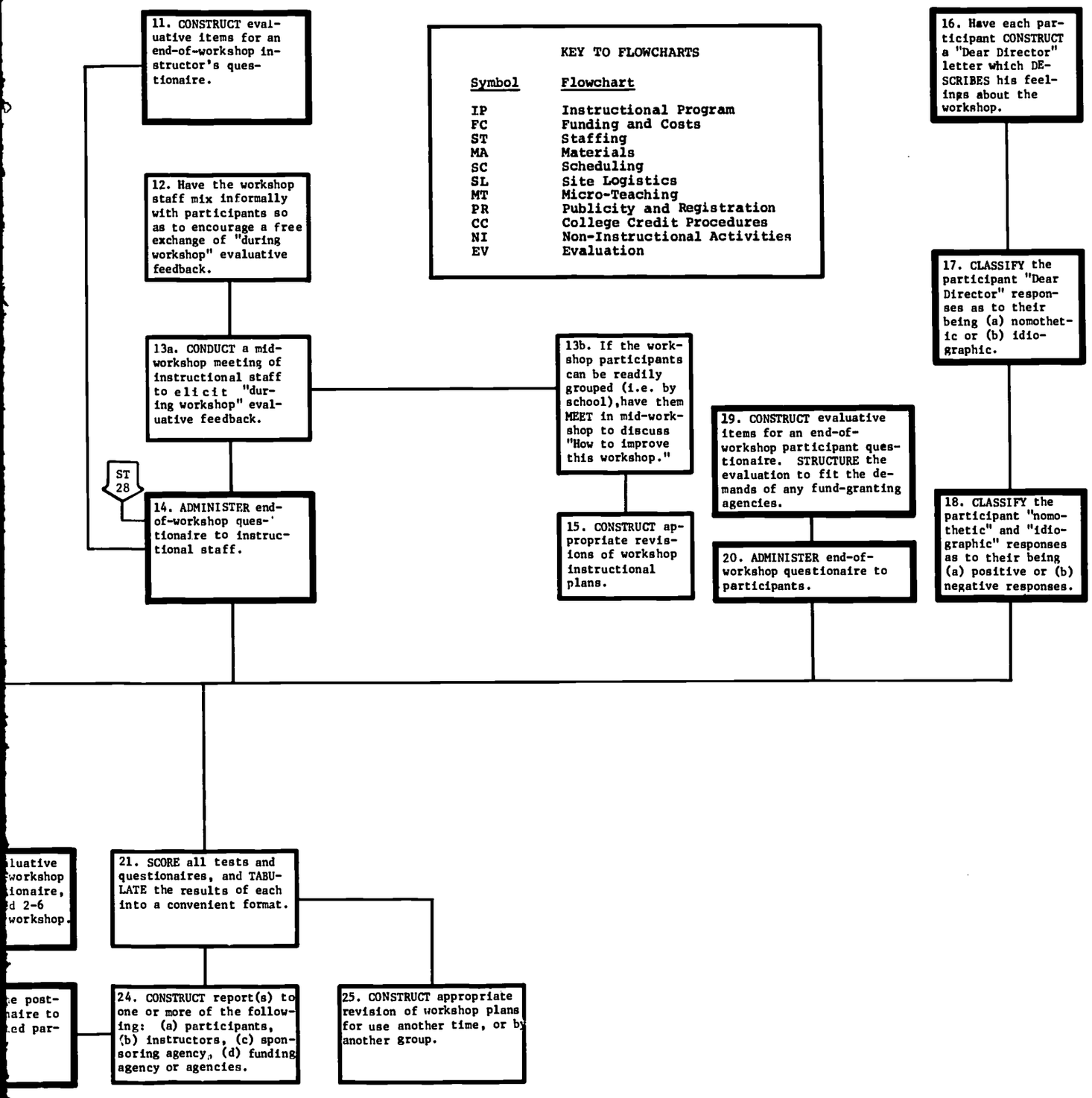
ST
25

NI—NON-INSTRUCTIONAL ACTIVITIES



EV–EVALUATION




11. CONSTRUCT evaluative items for an end-of-workshop instructor's questionaire.
KEY TO FLOWCHARTS
Symbol Flowchart
IP Instructional Program
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ST Staffing
MA Materials
SC Scheduling
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MT Micro-Teaching
PR Publicity and Registration
CC College Credit Procedures
NI Non-Instructional Activities
EV Evaluation
16. Have each participant CONSTRUCT a "Dear Director" letter which DESCRIBES his feelings about the workshop.
12. Have the workshop staff mix informally with participants so as to encourage a free exchange of "during workshop" evaluative feedback.
17. CLASSIFY the participant "Dear Director" responses as to their being (a) nomothetic or (b) idiographic.
13a. CONDUCT a mid-workshop meeting of instructional staff to elicit "during workshop" evaluative feedback.
13b. If the workshop participants can be readily grouped (i.e. by school), have them MEET in mid-workshop to discuss "How to improve this workshop."
19. CONSTRUCT evaluative items for an end-of-workshop participant questionaire. STRUCTURE the evaluation to fit the demands of any fund-granting agencies.
ST 28
14. ADMINISTER end-of-workshop questionaire to instructional staff.
15. CONSTRUCT appropriate revisions of workshop instructional plans.
20. ADMINISTER end-of-workshop questionaire to participants.
18. CLASSIFY the participant "nomothetic" and "idiographic" responses as to their being (a) positive or (b) negative responses.
luative workshop ionaire, d 2-6 workshop.
21. SCORE all tests and questionaires, and TABULATE the results of each into a convenient format.
e post-naire to ed par-
24. CONSTRUCT report(s) to one or more of the following: (a) participants, (b) instructors, (c) sponsoring agency, (d) funding agency or agencies.
25. CONSTRUCT appropriate revision of workshop plans for use another time, or by another group.