

WEFTEC® WORKSHOP INFORMATION AND PROPOSAL EVALUATIONS

With each year, WEF is receiving an increasing number of proposals for workshop presentations at WEFTEC. Consequently, two years ago we began to implement a more formal procedure for proposal review and selection. One of the results of this review procedure is the realization that those submitting proposals do not have adequate information on “what makes a quality proposal” or on the criteria for workshop selection at WEFTEC.

The purpose of this document is to give proposers more detailed information on the evaluation process, on criteria for workshop selection, and on “what makes a quality proposal”. The actual forms for submission are included in the package “WEFTEC Workshop Guidelines and Forms”, which includes detailed information about the submission requirements.

EVALUATION PROCESS

The deadline for proposal submittal is November of each year for WEFTEC of the following year. After the submittals are received, copies are made and distributed to reviewers on the WEFTEC Workshop Review Committee. The reviewers also receive survey comments on workshops that were presented in previous years.

In general, the WEFTEC Workshop Review Committee is composed of selected members of various technical committees as well as several “delivery” committees such as the Program Committee, the Professional Development Committee, and the Specialty Conference Committee. Because of the relative informality of the committee, it is possible that more than one member from a technical committee may provide input. The purpose is to encourage input from as wide a range of volunteers as possible, from both a technical standpoint and the delivery of a quality workshop.

Committee members submit their review comments to WEF in January and these comments are then tabulated by WEF staff prior to the annual Mid Year Meeting in February. At the Mid Year Meeting, the WEFTEC Workshop Review Committee meets to discuss the comments and finalize the selection of workshops. Anyone who has commented on the proposals is invited to attend. The committee is chaired by the Vice Chair of the Program Committee.

Given the range of reviewers, one of the main purposes of this meeting is to reach consensus on which workshop proposals best fit the overall needs of WEF. Some of the possible actions that may come as a result of that meeting include: 1) acceptance of the workshop as proposed; 2) conditional acceptance of the

workshop pending agreement by the proposer to specific changes; 3) recommendation that the workshop as proposed be presented in a technical session at WEFTEC; 4) recommendation that the workshop as proposed be presented at a specialty conference or as a stand-alone workshop; or 5) rejection of the workshop.

For the independent review, each reviewer is requested to rank the workshop proposals as follows:

Highly Desirable (5 points)

Desirable (4 points)

Acceptable (3 points)

Marginally Acceptable (2 points)

Unacceptable (1 point)

CRITERIA FOR EVALUATION AND SELECTION

The proposers need to keep in mind there are different styles of workshops that best fit different topics. Some by necessity must be very hands-on and others can tend to be more lecture or discussion oriented. However, workshops are intended to serve a different function than Technical Sessions at WEFTEC; they are the more interactive educational component. Workshops that offer a more hands-on learning environment through small breakout groups or promote active attendee involvement are encouraged.

Given the range of reviewer interests and viewpoints, there may be a wide range to the rankings. Nevertheless, some of the key criteria include:

1. WEF Sponsoring Committee or Sponsoring Organization
2. Chair
3. Speakers
4. Topic
5. Format
6. Materials

1. WEF Sponsoring Committee or Sponsoring Organization:

There is a desire to provide workshops that reflect the needs of all of the membership. This means, for example, if one committee or organization sponsors several workshops even if they are of high quality a decision may need to be made to eliminate one for the betterment of the membership and replace it with a workshop that can reach a different audience.

2. Chair:

The chairperson is critical to the success of the workshop; not only the final presentation of the workshop, but the development of the program as well. The chairperson must be committed to work diligently to develop and give a quality

program. The committee will consider the past performance of the chairperson on other workshops or training programs if that information is available. The chair of the workshop will have to prepare the proposal, line up speakers, prepare materials, communicate with the speakers, review speakers' materials and make revisions as needed, and lead the workshop. It is of value if the leader of the workshop is well rounded and well respected in the workshop topic.

3. Speakers:

Diversity of speakers is strongly encouraged. Workshop proposals on good topics have been rejected because there was a concern that too large a percentage of the speakers represented a single organization, agency or firm. WEFTEC Workshops are not an opportunity for a commercial endorsement of an agency, firm, service or product. Speakers for a workshop proposal should be considered with respect to the following:

1. Teaching ability
2. Integrity within the industry
3. Knowledge of the subject
4. Ability to represent different WEF committees/audiences
5. Gender or race
6. Ability to represent different regions of the country
7. Ability to present technical information without crossing over into a sales or marketing pitch

The number of speakers should be limited. In general, there should be around 5 to 7 speakers at most. There is no need to honor everyone involved—mention their name if needed, but they don't have to speak. Some of the directly hands-on workshops may have even fewer speakers and that is acceptable. Speakers should have hands-on experience with the topic.

4. Topic:

The WEFTEC Workshop Review Committee spends considerable effort determining if the topic is appropriate for a workshop or is better suited for a technical session or a specialty conference. As noted above, workshops are intended to be more detailed, more interactive, or provide more hands-on experience than a technical session. Proposers are encouraged to think of a small segment of a session and expand that out into a ½ or full day by adding depth to a topic (not just by adding speakers).

The WEFTEC Workshop Review Committee also considers if the topic is timely (specific new technology, pending regulations, administrative issues facing the industry, etc.) when ranking the proposals. When developing workshops, proposers should consider topics that are critical and timely to the industry and attempt to provide information which allows attendees to better perform their jobs.

Workshops that appeal to a broader audience are valued. However, there are some workshops that are necessary to fit a specific need. If a workshop does not appeal to a broader audience, justification should be provided. It is possible to have a successful workshop that appeals to a specialized audience but the WEFTEC Workshop Review Committee will consider if the workshop is better suited for a specialty conference or a stand-alone workshop.

5. Format:

Workshops are an opportunity to present information in detail and to give the speakers the opportunity to truly teach. Unless it is targeted as an overview, going into detail is encouraged. Exercises and hands-on activities are also encouraged.

Some ideas that have been well received in the past include:

1. Discuss the agenda at the opening of the workshop and attempt to tailor the discussion to the needs of the attendees.
2. Provide case histories – have actual people who have used/done/experienced the topic. Share successes (what works) and failures (what doesn't work). Often people learn more from what fails than from what works.
3. Provide details on the costs to construct and operate (new technology), implement (regulations), etc.
4. Provide details on the benefits and disadvantages of the subject.
5. Provide ample discussion opportunities, and not just a “token” discussion item on the agenda. Ideas include:
 - a. Panel discussions with several methods of soliciting input, including presenting the topic and asking for general questions from the audience; a short discussion followed by questions posed to/coming from the audience; etc.
 - b. Round table problem solving sessions
 - c. Round table discussions to identify issues, questions, problems
 - d. Panels to discuss round table findings, questions, etc.
 - e. Class activity or analysis of a case study

More detailed guidance on interactive formats is included in the appendix. This guidance was originally developed for specialty conferences, but has many good tips and ideas for workshops as well.

It is not uncommon for workshops to be presented at WEFTEC conferences several years in a row. If the workshop has been successful and is on ongoing timely topic, then repeating it is entirely appropriate.

6. Materials:

Remember that people come to workshops to learn in more depth so provide them more detail. Provide more than PowerPoint presentations. If you provide copies of the PowerPoint presentation, provide anecdotal information such as notes or additional text explaining what went into the PowerPoint slide.

If you review case histories or cost data, provide it to the participants. If you are presenting new regulations, provide copies of pertinent text. If you are presenting laboratory methods or new modeling software, explain its use and value or provide samples of the software.

The most common recurring comment from prior WEFTEC workshops relates to the quality of the materials provided. It is crucial to provide the depth of information that people can use both in the workshop and back in their offices. A few words on a slide may not be useful several months in the future when an attendee wants to put into action what was learned at the workshop. Often, the material changes from the time it is submitted to the actual presentation. This causes significant confusion by the attendees. Materials should be left in the same order, with additional information noted clearly.

WHAT MAKES A QUALITY PROPOSAL

The procedure for submitting proposals is presented in a document available from WEF. It provides a general description of the key components necessary to make a proposal sufficiently complete and additional information on what the reviewers consider will make a workshop successful. Issues such as obtaining speaker commitment, previous experience, anticipated number of attendees, etc. are basic to the proposal. This document is intended to provide better guidance to allow proposers to submit higher quality proposals.

A quality proposal provides a clear description of the vision of the workshop. This means providing well thought out description of the reason for presenting (why is the topic pertinent) and a discussion on the intended audience (reaching a broader audience is of value). The learning objectives should be detailed enough that someone can judge both before and after the workshop if it would be of value to attend. With that as a basis, the rationale for selecting each speaker should also be described. Providing information that substantiates the speaker's expertise on the subject matter and experience at presenting in a workshop format is valuable as well. The third component of a quality proposal is a well thought out description of the workshop format as the method for presenting the information. Innovative ideas that can create a hands-on interactive learning environment are encouraged. Use of electronic (PowerPoint) presentations along with use of hard copy materials should be discussed. These components will demonstrate to the reviewers that the workshop proposers have spent time and effort to provide a quality product.

APPENDIX A

Suggested Guidelines for Interactive Sessions at Specialty Conferences

A recurring comment in the evaluation of Specialty Conferences has been to incorporate more time for interaction between attendees. When interactive sessions have been held comments have been do even more or that they were the best part of the conference. Thus, the Specialty Conference Committee offers the following to committee chairs and organizing committees and encourages the incorporation of interactive sessions in all Specialty Conferences.

Why have interactive sessions?

It's a good way to get people involved. Some Conference attendees are reluctant to speak up in front of large groups. A small group setting, such as a round table with just 8 people, may allow those reluctant to say something in front of hundreds to be more open and less reticent. An interactive session is also a good way for attendees to get to know each other. They can make new friends and contacts and the transfer of information and knowledge is facilitated in a "user friendly" fashion. We all know how beneficial our network of contacts can be to help us solve problems. An interactive session can function as a "mini-network" and lead to life long friendships help everyone know that others have similar problems or have found solutions for what may have seemed like an insurmountable task. The interactive session is a good way to address issues or ideas that don't necessarily fit the "lecture/classroom" mode. And, an interactive session can be done at the end of the day in a less formal, more relaxed format.

How do you organize an interactive session?

A possible framework for organizing an interactive session is:

- Define the **Charge**: What is the mission/goal of the session? Will there be one large group or will there be several small groups? What assignment(s) will be made to the group(s)? What does the organizing committee want the outcome of the session to be?
- Identify group **Members**: Everyone that comes to the session? Round table format? Designated leaders and recorders for each round table? Is there a mix of representation in the group or are they all from the same organization? Do you want there to be a mix of groups?
- Identify the desired **Product**: What "report" comes out of the session? Does each group/round table give a report? Is the report verbal or written? Are recommendations that can be sent to regulators needed? Are there lists of

resources that can be developed by attendees? Is there a specific problem that can be addressed? Can the product be incorporated into the Conference Proceedings? Can it be distributed to everyone?

- Provide for **Feedback**: Does the Conference Chair or Session Moderator respond to issues raised? Is there a need for follow-up after the Conference? by WEF? by a regulatory agency? by some designated expert?
- Decide on a special **Time**: During the day? At the end of the formal presentations? Do you need 1 hour? 2 hours?
- Include an **Evaluation**: Get thoughts on how your format or session worked. Pass this on to the organizing committee for the next Specialty Conference on your topic.

How does the Session Moderator or Group Leader(s) get everyone to participate?

Some suggestions for Moderators/Leaders to facilitate interaction are:

- Don't lecture or answer questions - redirect questions back to the group as a whole. Try not to inject too much of your opinion or ideas even though the interaction may be lagging.
- Watch for chances when the group seems to have "talked out" a point and push forward. Don't rush the group because of time constraints. If a good dialogue is occurring don't be constrained by a set number of tasks. Remember the goal is interaction.
- Help focus the discussion and keep it on the subject, but don't be the focal point, be the guide.
- Encourage everyone to participate, but don't force people to contribute. Tactfully interrupt those who tend to dominate the discussion and try to bring out those who are reticent. Direct a question at the reluctant participant that you believe they can answer or have an opinion.
- Avoid being judgmental. Try to get all factors and implications considered. Try to keep enthusiasm high.
- Summarize during and at the end of the discussion. Try to call attention to unanswered questions or issues.
- Be flexible - avoid the "classroom" approach - but keep the group moving and on target.

- Emphasize points of agreement and disagreement. Play the “Devil’s Advocate” role - ask “what if ... “type questions.
- Use flip charts to print the session mission/goal; to record comments; to record decisions or recommendations; to have a record that can be formalized and distributed.