

*Program Management:  
Managing Deadlines, Details,  
Activities, and People*

*JERITT Monograph Five*

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**Program Management:  
Managing Deadlines, Details, Activities, and People**

**Maureen E. Conner  
Karen Waldrop**

**1994**

**The Judicial Education Reference, Information  
and Technical Transfer Project**



# Acknowledgements

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To all of you, please accept our heartfelt appreciation.

*Maureen E. Conner  
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# ***Preface***

Continuing professional education and training has gone from low-cost, unplanned, ad hoc meetings to a multi-million dollar industry. Consequently, the increasing sophistication of continuing education and training demands comprehensive and detailed program management.

This monograph explores program management for judicial education and training which is also evolving to higher levels of sophistication and complexity. This monograph addresses planning steps and time lines for faculty selection and management, facility selection and management, program announcements and confirmation notices, and budget planning and monitoring. Within each chapter, practical information and tools are offered to assist the program planner in managing multiple education and training demands.



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## Chapter 1: Monograph Overview and Introduction

Successful program management requires choreography: attention to detail and movement result in a stimulating and flawless performance.

Program management consists of a variety of activities related to deadlines, faculty selection and management, facility selection and management, program announcements, expenses, and budgets. All of these activities are explored extensively in the next five chapters. Forms, checklists, or sample letters accompany each chapter and are provided so that they can be adapted by judicial education organizations when needed.

This monograph begins where *Curriculum, Program, and Faculty Development: Managing People, Process, and Product: JERITT Monograph Four* (Waldrop and Conner, 1994), stops. That is, it begins after needs have been identified, goals and objectives established, topics selected, and potential faculty named. It focuses on managing the many details, simultaneous deadlines, and continuous activities required to conduct a successful training and education program. Although activities vary in proportion to the size and complexity of the program (which affects the number of staff required to manage a program), there should always be one person ultimately responsible for managing the program: the program planner.

This monograph is written for the program planner. However, it is also a useful tool for administrators, curriculum developers, and faculty members who can benefit by knowing and understanding how their decisions and subsequent actions can either hinder or enhance the planning and management of any given training or education event.

New program planners should find this monograph especially helpful. Veteran planners may find that this monograph provides an opportunity to reflect on how they currently manage programs and whether adjustments might make their jobs easier while still producing a high quality program.

Chapters two through six of this monograph cover the bulk of program management:

- **Time Lines and Planning** addresses the need for establishing deadlines for activities and assigning staff to be responsible for carrying out the activities by the date specified.
- **Faculty Selection and Management** concerns pre-program, on-site, and post program interactions with faculty.

- **Facility Selection and Management** starts with contacting and assessing facilities, visiting and selecting sites, interacting with and managing the planning and subsequent use of facilities, and ends with writing letters of appreciation and feedback.
- **Program Announcements and Confirmation Notices** lists items to be considered for each. Program announcements and confirmation notices make a statement about the judicial education organization, its commitment to thoroughness in planning and holding education and training, and its expectations of the participants who enroll.
- **Budgets** provides forms for program budgets and budget work sheets which can help the program planner calculate expenses, identify cost problem areas, and provide a record explaining how funds were spent within or outside of the budgeted amounts.

## How to Use This Monograph

The chapters presented in this monograph are offered as a way to manage the deadlines, details, activities, and people involved in conducting a program. Because program management is fluid and expands and contracts with the size and number of programs, the processes and forms offered should be reviewed and revised as needed by the program planner to fit the organizational culture. The training and education environment, budget limitations, political climate, and mission of the judicial education organization will determine the extent to which the suggested processes and forms can be used.

As a way of helping the program planner prepare for and carry-out the program planning process, an overview is offered by way of a program management overview list on page 5. Detailed information for each item which appears on the list is available within the corresponding chapter in this monograph. Program management does not take place in a vacuum. It happens in conjunction with curriculum planning and development, which is the focus of *Curriculum, Program, and Faculty Development: Managing People, Process, and Product: JERITT Monograph Four* (Waldrop and Conner, 1994).

## Supplementary Materials and Information

Other program management references are available for program planners. Specifically, in the judicial education field, the *Adult Education Perspectives for Judicial Education* (1992) edited by Diane E. Tallman and published by the Judicial Education Adult Education Project (JEAEP) addresses issues related to program management, among other things. Of particular interest to program planners are: Section 6.1 on "Conference Site Coordination," written by Scott C. Smith; Section 7.1 on "Media and

Technology," written by Kent L. Gustafson and Melvin M. Bowie; and Section 11.1 "An Approach to Conference Administration," written by Sandra A. Ratcliff.

A reference which would provide information to program planners about adult learning and educational planning is *Education for Development: Principles and Practices in Judicial Education: JERITT Monograph Three* (1992), authored by Charles S. Claxton and Patricia H. Murrell.

Program planners interested in needs assessment and evaluation can consult *Judicial Education Needs Assessment and Program Evaluation: JERITT Monograph One* (1991), by John K. Hudzik.

A resource, which will soon be available for all program planners in the judicial education field, is the Judicial Education Management System (JEMS) currently under development by the National Association of State Judicial Educators (NASJE), with technical support from the National Center for State Courts (NCSC), and funded by the State Justice Institute (SJI). The intent of JEMS is to automate many of the responsibilities of the program planner.

Lastly, for program planners who need information on or assistance in meeting accessibility requirements under the Americans with Disabilities Act, resources are available. Such resources include:

- State or local chapters of the Easter Seal Society, Goodwill Industries, and the United Cerebral Palsy Association
- A national association which can assist program planners in securing interpreters for persons with hearing impairments is:

The Registry of Interpreters for the Deaf  
8719 Colesville Road, Suite 310  
Silver Springs, MD 20910-3919  
Phone: 301/608-0050

- The American Bar Association Commission on Mental and Physical Disability Law  
1800 M Street, NW  
Washington, DC 20036-5886  
Contact: Ms. Kristi Bleyer at 202/331-2240

★ Forms for Monograph Overview and Introduction* ★	
Form Name	Page Number
Program Management Overview List	5

\*All forms are samples to be adapted as needed to fit the judicial education organization.



## Program Management Overview List



**Instructions to Program Planner:** Use this form as a way to familiarize yourself with the broad range of responsibilities required to manage programs. To operationalize each item contained within this checklist use the forms, samples, and checklists pertaining to that specific item found within the corresponding chapter in this monograph.

**Tasks to complete when managing a program.**

**1. Time lines and planning (see Chapter 2):**

- \_\_\_\_\_ Determine program date
- \_\_\_\_\_ Identify and schedule tasks
- \_\_\_\_\_ Establish task deadlines
- \_\_\_\_\_ Assign tasks
- \_\_\_\_\_ Distribute timeline information

**2. Faculty selection and management (see Chapter 3):**

*Pre-Program Faculty Management*  
(see Phase 1)

- \_\_\_\_\_ Complete the faculty contact sheet
- \_\_\_\_\_ Write the faculty contract
- \_\_\_\_\_ Send the faculty confirmation letter
- \_\_\_\_\_ Send the final faculty letter

*On-Site Faculty Management*  
(see Phase 2)

- \_\_\_\_\_ Take items to session room
- \_\_\_\_\_ Complete session room set-up
- \_\_\_\_\_ Begin the session
- \_\_\_\_\_ Monitor breaks
- \_\_\_\_\_ Close the session
- \_\_\_\_\_ Staff evaluation of faculty

*Post-Program Faculty Management*  
(see Phase 3)

- \_\_\_\_\_ Send faculty appreciation letter
- \_\_\_\_\_ Conduct post-program faculty meeting

**3. Facility selection and management (see Chapter 4):**

- \_\_\_\_\_ Considerations for facility selection
- \_\_\_\_\_ Contact facilities
- \_\_\_\_\_ Facility selection
- \_\_\_\_\_ Facility management
- \_\_\_\_\_ On-site coordination
- \_\_\_\_\_ After the program

**4. Program announcements and confirmation notices (see Chapter 5):**

- \_\_\_\_\_ Write and send program announcements
- \_\_\_\_\_ Write and send confirmation notices

**5. Budgets (see Chapter 6):**

- \_\_\_\_\_ Determine the program budget
- \_\_\_\_\_ Utilize the budget work sheets



## **Chapter 2: Time Lines and Planning**

A time line tells program planners where and when to start and what to do along the way. It also signals milestones and whether deadlines are met and it marks the final destination. No program should be launched without first establishing a time line.

The length of the time line depends on the type of program. For example, conferences will usually have multiple concurrent sessions, large plenary sessions, numerous faculty, a large participant count, and several meals and breaks. Consequently, conference planning usually starts much earlier than planning for a single-session seminar or workshop which is typically for fewer participants, requiring fewer meeting rooms, faculty, and so on.

Establishing a time line involves several tasks.

### **First Task: Determine Program Date**

Whether planning a conference or a smaller event, the planner should always start from the date of the event and **work backwards** to identify the sequence of critical tasks and set deadlines for each.

### **Second Task: Identify and Schedule Tasks**

The success of any program rests on identifying what essential tasks must be done and by when. The very nature of training and education requires mastery of simultaneous logistical arrangements. Not only are there arrangements for a single program, but in most judicial education organizations, several programs are in various planning stages simultaneously requiring management of a multitude of logistical details with competing deadlines. By identifying critical tasks, the planner determines what work must be done. And, by assigning deadlines for these tasks, the planner determines when tasks must be completed.

### **Third Task: Establish Task Deadlines**

Establishing task deadlines provides the planner with a way to schedule activities to ensure that all tasks are completed before the program date. Deadlines also set the pace for achieving the tasks. Essentially, deadlines keep the activities on schedule and the people responsible for these activities accountable for their successful execution and completion.

## **Fourth Task: Assign Tasks**

Judicial education organizations vary in staff size. Some organizations have only the judicial educator who is responsible for program planning and curriculum development for all audiences and programs. Others have program managers who manage curriculum development and program planning for one particular audience. Still other organizations have a person dedicated solely to program planning. Regardless of the staff size or staffing pattern, decisions must be made about who is going to complete the tasks and that information must be noted on the time line.

## **Fifth Task: Distribute Time Line Information**

Sometimes time lines are viewed mistakenly as internal documents; not to be shared with boards, committees, or faculty members. However, by keeping time line information internal to the organization, a prime opportunity to educate those involved about the amount of time, resources, and expertise involved in developing and delivering training and education is lost. Any well developed and delivered training and education program looks effortless. But, by sharing time line information with boards, committees, and faculty, everyone can see the many steps involved, and those with a role in the program can see their contribution in the larger context.

While recognition of program planning is a complex undertaking to achieve, it is even more important that the recognition translates into an understanding of how training and education is managed. This is important so that future requests for training and education are made with the knowledge of the consequences such requests will have in consuming staff time and organizational resources. Beyond the education value of time lines, other benefits are also evident. By distributing time lines, there is no misunderstanding about when and what is to be done and by whom. Additionally, training is a team project; therefore, by involving all affected parties, group ownership in the process and product of the training program is enhanced.

Three sample time lines are offered on pages 11, 13, and 15; one each for conferences, seminars/workshops, and interactive broadcasts.

For purposes of definition, conferences are events which are educational and perhaps social in nature. They are offered for a large group of participants with many simultaneous educational sessions and activities scheduled on a variety of topics and subtopics and include many faculty members. Seminars/workshops, in contrast, are usually limited enrollment, with sessions focused on one main topic comprised of intensive in-session work and directed by very few faculty members.

Interactive broadcasts are usually of very short duration and take place simultaneously at several geographic locations with a small number of participants at each location. There may be one or more faculty members with a discussion leader at each location.

Regardless of the type of program, the time lines begin with committee selection, continue through program development, faculty selection, announcements, facility arrangements, registration, and practice sessions. Time lines for individual judicial education organizations should be modified to reflect staffing patterns and the local judicial culture. No sample time lines are included for the development of videotape training or self-instructional training packages. However, the development of such time lines rests on similar principles:

- First, determine the completion date and work backwards to set the work schedule.
- Second, identify tasks which are required to complete the project.
- Third, select and assign staff to the tasks which they are most capable of doing.
- Fourth, monitor the progress of each task and whether the task is completed by the established deadline.

★ Forms for Time Lines★	
Form Name	Page Number
Conference Management Time Line	11
Seminar/Workshop Management Time Line	13
Interactive Broadcast Management Time Line	15

★ **Conference Management Time Line** ★

**Instructions to Program Planner:** This form should be completed for the purpose of setting deadlines, assigning tasks, and monitoring completion of tasks.

	Assigned To	Start Date	Finish Date	Date Completed
<b>12 Months Prior*</b>				
Committee Selected	_____	_____	_____	_____
Chair Selected (if necessary)	_____	_____	_____	_____
Conference Dates Determined	_____	_____	_____	_____
Conference Length Established	_____	_____	_____	_____
Deadlines Established	_____	_____	_____	_____
Facility Selected and Meeting Space Reserved	_____	_____	_____	_____
Audience Identified	_____	_____	_____	_____
<b>10 Months Prior</b>				
Committee Meeting Held	_____	_____	_____	_____
Topics Identified	_____	_____	_____	_____
Curriculum Development Sheets Completed	_____	_____	_____	_____
Non-Committee Faculty Identified	_____	_____	_____	_____
Committee Assignments Made	_____	_____	_____	_____
<b>9 Months Prior</b>				
Faculty Selected and Contacted	_____	_____	_____	_____
Contracts Negotiated (if necessary)	_____	_____	_____	_____
<b>7 Months Prior</b>				
Faculty Meeting Held	_____	_____	_____	_____
<b>6 Months Prior</b>				
Presentation Proposals Submitted for Committee Review	_____	_____	_____	_____

\*Adjust time frames and tasks to fit staffing patterns, demands on judicial education organization resources, and judicial education program and development structure.

	Assigned To	Start Date	Finish Date	Date Completed
<b>5 Months Prior</b>				
Feedback Provided to Faculty on Plans	_____	_____	_____	_____
Program Announcement Information Submitted to Graphic Artist	_____	_____	_____	_____
<b>4 Months Prior</b>				
Program Announcement Designed and Submitted for Committee Review	_____	_____	_____	_____
<b>3 Months Prior</b>				
Audiovisual Material Requests Submitted to Graphic Artist	_____	_____	_____	_____
Program Announcement Printed and Mailed**	_____	_____	_____	_____
<b>2 Months Prior</b>				
Registration Deadline	_____	_____	_____	_____
Preliminary Logistical Information Sent to Facility	_____	_____	_____	_____
<b>6 Weeks Prior</b>				
Conference Materials Submitted for Duplication	_____	_____	_____	_____
Preliminary Registration Information Provided to Faculty and Committee	_____	_____	_____	_____
Participant Confirmation Letters and Pre-Conference Assignments Mailed (if necessary)	_____	_____	_____	_____
<b>1 Month Prior</b>				
Sample of Materials, Hard Copy of Audiovisual Materials, and Logistical Sheets Submitted to Faculty	_____	_____	_____	_____
Final Registration Information Provided to Faculty and Committee	_____	_____	_____	_____
All Logistics Finalized and Guaranteed with Facility	_____	_____	_____	_____
<b>2 Weeks Prior</b>				
Send Program Materials to Facility	_____	_____	_____	_____

**Notes:**

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\*\*If a yearly master program calendar has not been issued previously, the program planner should consider distributing the program announcement earlier so that appropriate staffing assignments can be made within the courts while still allowing for program attendance.

**Seminar/Workshop Management Time Line**

**Instructions to Program Planner:** This form should be completed for the purpose of setting deadlines, assigning tasks, and monitoring completion of tasks.

	Assigned To	Start Date	Finish Date	Date Completed
<b>10 Months Prior*</b>				
Committee Selected	_____	_____	_____	_____
Chair Selected (if necessary)	_____	_____	_____	_____
Seminar/Workshop Dates Determined	_____	_____	_____	_____
Program Length Established	_____	_____	_____	_____
Deadlines Established	_____	_____	_____	_____
Facility Selected and Meeting Space Reserved	_____	_____	_____	_____
Audience Identified	_____	_____	_____	_____
<b>8 Months Prior</b>				
Committee Meeting Held	_____	_____	_____	_____
Topics Identified	_____	_____	_____	_____
Curriculum Development Sheets Completed	_____	_____	_____	_____
Non-Committee Faculty Identified	_____	_____	_____	_____
Committee Assignments Made	_____	_____	_____	_____
<b>7 Months Prior</b>				
Faculty Selected and Contacted	_____	_____	_____	_____
Contracts Negotiated (if necessary)	_____	_____	_____	_____
Faculty Meeting Held	_____	_____	_____	_____
<b>6 Months Prior</b>				
Presentation Proposals Submitted for Committee Review	_____	_____	_____	_____
Feedback Provided to Faculty on Plans	_____	_____	_____	_____
Program Announcement Information Submitted to Graphic Artist	_____	_____	_____	_____

(Page 1 of 2)

\*Adjust time frames and tasks to fit staffing patterns, demands on judicial education organization resources, and judicial education program and development structure.

	Assigned To	Start Date	Finish Date	Date Completed
<b>5 Months Prior</b>				
Program Announcement Designed and Submitted for Committee Review	_____	_____	_____	_____
<b>3 Months Prior</b>				
Program Announcement Printed and Mailed**	_____	_____	_____	_____
<b>2 Months Prior</b>				
Registration Deadline	_____	_____	_____	_____
Preliminary Logistical Information Sent to Facility	_____	_____	_____	_____
<b>6 Weeks Prior</b>				
Audiovisual Material Requests Submitted to Graphic Artist	_____	_____	_____	_____
Program Materials Submitted for Duplication	_____	_____	_____	_____
<b>1 Month Prior</b>				
Final Registration Information Provided to Faculty and Committee	_____	_____	_____	_____
Participant Confirmation Letters and Pre-Program Assignments Mailed (if necessary)	_____	_____	_____	_____
All Logistics Finalized and Guaranteed with Facility	_____	_____	_____	_____
Sample of Materials, Hard Copy of Audiovisual Materials, and Logistical Sheets Submitted to Faculty	_____	_____	_____	_____
<b>1 Month Prior</b>				
Send Program Materials to Facility	_____	_____	_____	_____

**Notes:**

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\*\*If a yearly master program calendar has not been issued previously, the program planner should consider distributing the program announcement earlier so that appropriate staffing assignments can be made within the courts while still allowing for program attendance.

**Interactive Broadcast Management Time Line**

**Instructions to Program Planner:** This form should be completed for the purpose of setting deadlines, assigning tasks, and monitoring completion of tasks.

	Assigned To	Start Date	Finish Date	Date Completed
<b>10 Months Prior*</b>				
Committee Selected	_____	_____	_____	_____
Chair Selected (if necessary)	_____	_____	_____	_____
Broadcast Dates Determined	_____	_____	_____	_____
Program Length Established	_____	_____	_____	_____
Deadlines Established	_____	_____	_____	_____
Facility Selected and Meeting Space Reserved	_____	_____	_____	_____
Audience Identified	_____	_____	_____	_____
<b>8 Months Prior</b>				
Committee Meeting Held	_____	_____	_____	_____
Topics Identified	_____	_____	_____	_____
Curriculum Development Sheets Completed	_____	_____	_____	_____
Facility, Date, and Program Length Finalized	_____	_____	_____	_____
Non-Committee Faculty Identified	_____	_____	_____	_____
Committee Assignments Made	_____	_____	_____	_____
Facility Scheduled	_____	_____	_____	_____
Contracts Negotiated for Services (technical consultants, satellite)	_____	_____	_____	_____
<b>7 Months Prior</b>				
Faculty Selected and Contacted	_____	_____	_____	_____
Faculty Meeting Held to Discuss Program Outline/Studio/Graphics/Broadcast Process/Needs	_____	_____	_____	_____
Contracts Negotiated with Faculty (if necessary)	_____	_____	_____	_____
*Dry Run* Date Determined	_____	_____	_____	_____

(Page 1 of 2)

\*Adjust time frames and tasks to fit staffing patterns, demands on judicial education organization resources, and judicial education program and development structure.

	Assigned To	Start Date	Finish Date	Date Completed
<b>6 Months Prior</b>				
Program Outline and/or Script Submitted for Committee Review	_____	_____	_____	_____
Feedback Provided to Faculty	_____	_____	_____	_____
Program Announcement Information Submitted to Graphic Artist	_____	_____	_____	_____
Meeting with Local Facilitators Held to Discuss Broadcast	_____	_____	_____	_____
<b>4 Months Prior</b>				
Program Announcement Designed and Submitted for Committee Review	_____	_____	_____	_____
Graphics Submitted to Graphic Artist for Production	_____	_____	_____	_____
<b>3 Months Prior</b>				
Program Announcement Printed and Mailed**	_____	_____	_____	_____
<b>2 Months Prior</b>				
Registration Deadline	_____	_____	_____	_____
Preliminary Logistical Information Sent to Facility	_____	_____	_____	_____
<b>6 Weeks Prior</b>				
Program Materials Submitted for Duplication	_____	_____	_____	_____
<b>1 Month Prior</b>				
Final Registration Information Provided to Faculty and Committee	_____	_____	_____	_____
All Logistics Finalized and Guaranteed with Facility	_____	_____	_____	_____
Sample of Materials, Hard Copy of Broadcast Graphics, and Logistical Sheets Submitted to Faculty	_____	_____	_____	_____
Participant Confirmation Letters and Pre-Program Assignments Mailed (if necessary)	_____	_____	_____	_____
<b>1 Week Prior</b>				
"Dry Run" Held	_____	_____	_____	_____
Adjustments Made for Live Broadcast	_____	_____	_____	_____
Send Program Materials to Facility	_____	_____	_____	_____

**Notes:**

(Page 2 of 2)

\*\*If a yearly master program calendar has not been issued previously, the program planner should consider distributing the program announcement earlier so that appropriate staffing assignments can be made within the courts while still allowing for program attendance.

## **Chapter 3: Faculty Selection and Management**

Faculty may be lecturers, teachers, discussion leaders, facilitators, or instructors. In whatever capacity the faculty functions, hands-on management of their contributions by the planner is required. Faculty management demands that the planner:

- Convey information about the basic objectives of the program.
- Obtain an initial program plan or proposal from the faculty member.
- Commit the faculty member to a contract.
- Monitor the development of the topic.
- Establish a joint faculty and planning committee meeting.
- Follow-up on materials and teaching needs.
- Ensure that deadlines are met.

In short, thorough faculty management keeps the planner and the faculty member in close contact before, during, and after the program.

Chapter 3 is divided into three phases: pre-program, on-site, and post-program faculty management.

### **Phase 1: Pre-Program Faculty Management**

Solid pre-program faculty management will minimize the chance that faculty will be unprepared for the challenges of presenting at the program. Successful faculty management will result in the faculty knowing and delivering on all expectations and contractual agreements. Completing the following tasks improves pre-program faculty management.

#### **First Task: Complete the Faculty Contact Sheet**

The faculty contact sheet is designed to be completed prior to the first faculty contact and to be used to guide the initial conversation between the planner and faculty. The contact sheet contains all the information the planner must give to the faculty; such as session topic, date and time of presentation, anticipated number of participants, program agenda, faculty information, goals and objectives of presentation, and the overall program and audience profile. Additionally, the contact

sheet contains a number of items which must be clarified by each faculty member; such as their correct name, title, address, phone number, fee information, and required travel reimbursement. The faculty contact sheet is on page 21.

## **Second Task: Write the Faculty Contract**

A limited services contract between the judicial education organization and the faculty member is the standard method used to confirm the rights and obligations of both parties involved. The contract covers terms, description of services, payment of services, method of payment, termination and breach, copyright and ownership of material, record keeping, contractor's status, arbitration, and applicable law. The contract formalizes the agreement between the planner and the faculty member and legally protects the judicial education organization and the faculty member. A faculty contract checklist is on page 23. The faculty contract is usually sent with the confirmation letter.

## **Third Task: Send the Faculty Confirmation Letter**

The first faculty letter is a confirmation letter in which the planner provides all necessary information within the content of the letter, or as enclosures, including at minimum:

- Faculty contract
- Draft agenda
- Planning committee list
- Topical descriptions
- Time line summary
- Facility reservation information
- Program proposal form
- Teaching aid request form
- Duplication request form

Contained within the confirmation letter is an invitation to attend a faculty meeting (if there is to be one) for the purpose of planning the program as well as reviewing and refining presentations and materials.

The confirmation letter, draft agenda, planning committee list, topic description, time line summary, facility reservation information, presentation proposal form, teaching aid request form, and duplication request form are on pages 25, 27, 28, 29, 30, 31, 32, 49, and 50.

#### **Fourth Task: Send the Final Faculty Letter**

The second faculty letter finalizes all of the program arrangements and is typically the last correspondence the planner sends to the faculty before the program. This letter includes:

- Logistical information
- Faculty guidelines
- Program announcement
- Final program agenda
- Copy of the faculty member's materials

The sample final faculty letter, faculty guidelines, and meeting room logistical information forms are on pages 52, 53, and 54.

★ Forms for Pre-Program Faculty Management* ★	
Form Name	Page Number
Faculty Contact Sheet	21
Faculty Contract Checklist	23
Faculty Confirmation Letter	25
Draft Agenda for Planning Purposes Only	27
Planning Committee List	28
Topic Descriptions to Aid in Planning	29
Time Line Summary	30
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\*Adjust time frames and tasks to fit staffing patterns, demands on judicial education organization resources, and judicial education program and development structure.



## Faculty Contact Sheet



**Instructions to Program Planner:** Use this form to prepare for the first faculty contact. Additionally, information received and given during the contact should be recorded here and placed in the program file for future use.

**1. Complete before making contact with faculty:**

Session Topic: \_\_\_\_\_  
 Date of Presentation: \_\_\_\_\_  
 Location of Presentation: \_\_\_\_\_  
 Time of Presentation: \_\_\_\_\_  
 Maximum Number of Participants: \_\_\_\_\_  
 Participant Group Profile: \_\_\_\_\_

**2. Give the following information to faculty during the initial contact (check when complete):**

\_\_\_\_\_ training event agenda or description  
 \_\_\_\_\_ date(s) of training event  
 \_\_\_\_\_ facility information (name, location)  
 \_\_\_\_\_ time of presentation  
 \_\_\_\_\_ length of presentation  
 \_\_\_\_\_ need/goal/objective for topic  
 \_\_\_\_\_ participant profile

**3. Confirm the following information if faculty member agrees to participate:**

Name (correct spelling): \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Organization: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 \_\_\_\_\_  
 Office Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Home Phone: \_\_\_\_\_

**4. Explain that a confirmation letter will be sent providing the program information given above and requesting information on the proposed session such as the presentation proposal, duplication request, teaching aid request, etc.**

**5. Inquire about financial obligation (check as appropriate):**

\_\_\_\_\_ no financial obligation, faculty will serve at no charge  
\_\_\_\_\_ travel reimbursement required (estimated amount \_\_\_\_\_ )  
\_\_\_\_\_ honorarium or fee required (requested amount \_\_\_\_\_ )

If there is a financial obligation, explain that a contract will be included in the confirmation letter mailing.

**6. Sign and date:**

Contact Made By: \_\_\_\_\_  
Date: \_\_\_\_\_

Notes:

**Faculty Contract Checklist**

**Instructions to Program Planner:** The faculty contract must be developed in cooperation with the judicial education organization legal advisor. By using this form, you will have identified for the legal advisor those items which you feel are important for the successful execution of the program.

**1. Terms of contract:**☐

date contract begins: \_\_\_\_\_

☐

date contract ends: \_\_\_\_\_

**2. Description of service:**☐

preparation and planning: \_\_\_\_\_

☐

curriculum development: \_\_\_\_\_

☐

teaching materials: \_\_\_\_\_

☐

presentation: \_\_\_\_\_

☐

program follow-up: \_\_\_\_\_

**3. Payment for services:**☐

faculty fee: \_\_\_\_\_

☐

travel expenses: \_\_\_\_\_

☐

other expenses (list): \_\_\_\_\_

**4. Method of payment:**☐

submission of invoice at conclusion of work: \_\_\_\_\_

☐

documentation of amounts appearing on the invoice: \_\_\_\_\_

**5. Termination and breach:**☐

faculty notice for termination of contract, with or without cause: \_\_\_\_\_

☐

judicial education organization notice for termination of contract, with or without cause: \_\_\_\_\_

☐

conditions for breach of contract: \_\_\_\_\_

☐

reimbursement in the event of termination or breach by contractor: \_\_\_\_\_

☐

reimbursement in the event of termination or breach by contractee: \_\_\_\_\_

6. **Copyrights and ownership of materials:**
- ☐ what work products are owned by the judicial education organization: \_\_\_\_\_
  - ☐ has the faculty or judicial education organization received authorization to use copyrighted materials submitted by the faculty: \_\_\_\_\_
7. **Recordkeeping:**
- ☐ faculty obligation for financial record retention: \_\_\_\_\_
  - ☐ access to faculty financial records: \_\_\_\_\_
8. **Contractor's status:**
- ☐ faculty is an independent contractor (check for conditions under which an individual may appropriately be engaged as and considered an independent contractor)
9. **Arbitration:**
- ☐ when is arbitration of disputes necessary: \_\_\_\_\_
  - ☐ limit of damages to be arbitrated: \_\_\_\_\_
10. **Applicable law:**
- ☐ adherence by all parties to all applicable state and federal law
11. **Signatures:**
- ☐ judicial education organization representative name, title, and date of signature
  - ☐ faculty name, title, social security or federal employer identification number, and date of signature
12. **Notarized (if applicable):**
- ☐ contractor signature
  - ☐ contractee signature



## Faculty Confirmation Letter



**Instructions to Program Planner:** Send this letter with attachments to the faculty. This letter is a formalization of all previous contacts with the faculty.

{date}

{title, first name, last name}

{position}

{address}

{city, state zip code}

Dear {title} {last name}:

Thank you for agreeing to serve as a faculty member for the {program title}. Program facts are as follows:

Title/Theme:	{title or theme}
Dates:	{month, day, year}
Location:	{hotel or site}
	{address}
	{city, state zip code}
	{phone number}

The program will offer educational programs for {anticipated program participants' job categories, experience level, etc.}.

Please find enclosed:

1. A draft program agenda with your session(s) highlighted. This agenda may be subject to revision; you will be contacted to discuss any such changes affecting your session. Please confirm, by letter or phone, the date(s) and time(s) of your session(s) with me.
2. The planning committee list with appropriate individuals highlighted as "contacts/resources." Please contact these individuals if you need additional content-related information.
3. A brief topic description, as defined by the planning committee. This is intended to give you an idea of how the committee perceives the specific topic you will be presenting.
4. A time line summary providing important dates needing your attention and response.
5. Facility information for your use in making lodging reservations, if necessary.

{title, first name, last name}

{date}

Page 2

Also enclosed, **to be completed and returned:**

1. Presentation Proposal Form. This form is for our files, to provide information for the program announcement, to assist in planning and reserving needed audiovisual equipment, etc. Please return the completed form by {date - usually the date of the faculty meeting}.
2. Teaching Aid Request Form. Use this form to request staff assistance in creating overhead transparencies, slides, etc. Use one request form for each teaching aid. Please duplicate the teaching aid request form as needed. All requests must be received by {date}.
3. Duplication Request Form. Use this form when submitting materials for duplication. All materials must be submitted for duplication by {date}. Note: whether duplicated by this organization or not, a copy of any material to be distributed at the program must be submitted for the file.

Before closing, I invite you to attend a faculty meeting for the purpose of introducing you to the staff and planning committee, discussing training content-related matters, seeing the program location, and completing any necessary forms. The meeting agenda is enclosed. Please plan on attending. If you are unable to attend, contact me. Additionally, if you have questions regarding your travel arrangements and reimbursement for this meeting, call me; I will be happy to answer your questions. The meeting information is as follows:

Date: {date}  
Time: {time}  
Location: {address}  
{city, state zip code}  
{phone}

Sincerely,

{planner name}

Enclosures:

Draft Agenda  
Planning Committee List  
Topic Descriptions  
Time Line Summary  
Facility Information  
Presentation Proposal Form  
Teaching Aid Request Form  
Duplication Request Form



## Draft Agenda for Planning Purposes Only



**Instructions to Faculty:** This draft agenda is offered to all program faculty by the program planner for the purpose of planning their individual presentations and to provide information on all other presentations.

{Name of Program}

{Date of Program}

{Day of Program, Date of Program}

{Time}

{Name of Session/Activity}

{Name of Topic}

{Faculty Name}

{Anticipated Number of Participants}

{Participant Composition}

{Tentative Room Assignment}

{Time}

{Name of Session/Activity}

{Name of Topic}

{Faculty Name}

{Anticipated Number of Participants}

{Participant Composition}

{Tentative Room Assignment}

{Time}

{Name of Session/Activity}

{Name of Topic}

{Faculty Name}

{Anticipated Number of Participants}

{Participant Composition}

{Tentative Room Assignment}

**Adjourn**



## Planning Committee List



**Instructions to Faculty:** If you would like more information about program topics, audience profile, and training needs or objectives, contact any of the individuals on this list.

{Title, First Name, Last Name}  
{Position}  
{Organization}  
{Address}  
{City, State Zip Code}  
{Phone Number}  
{Fax Number}

{Title, First Name, Last Name}  
{Position}  
{Organization}  
{Address}  
{City, State Zip Code}  
{Phone Number}  
{Fax Number}

{Title, First Name, Last Name}  
{Position}  
{Organization}  
{Address}  
{City, State Zip Code}  
{Phone Number}  
{Fax Number}



## Topic Descriptions To Aid In Planning



**Instructions to Faculty:** The following are brief descriptions of the topics to be presented by you. These descriptions are given as questions to help stimulate faculty thoughts about the focus and direction of the topics. The descriptions are not meant to be comprehensive or constraining but are offered to give faculty a starting point for planning. If further clarification is needed, please contact a planning committee member(s) or the program planner. Final topic titles are to be determined by the responsible faculty member.

### Topics To Be Presented

#### Examples:

##### **Probation: People Working With People**

What is probation, how does it fit into the overall judicial system, what are some answers to the questions probation employees have?

Topic Name: \_\_\_\_\_

Description: \_\_\_\_\_

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

##### **Probation: A National Perspective**

What is happening with probation in other states, what new programs are being implemented, what is being tried nationally that might benefit probation in our state?

Topic Name: \_\_\_\_\_

Description: \_\_\_\_\_

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

{Topic Title}

{Question}

Topic Name: \_\_\_\_\_

Description: \_\_\_\_\_

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

**Time Line Summary**

**Instructions to Faculty:** Please record these dates in your calendar to ensure that all information is received (not post marked) by the program planner on the date specified.

Limited Service Contract Due	{Date}
Presentation Proposal Due	{Date}
Biographical Information Sheet Due	{Date}
Teaching Aid Request Form Due	{Date}
Duplication Request Form Due	{Date}
Training Event	{Date}

**Facility Reservation Information**

**Instructions to Faculty:** Please use this form when making lodging reservations, if required, and/or conducting a site visit prior to the program. The program planner offers you this facility reservation information so that you will be informed about the facility and what arrangements have been made for your stay.

**Facility Reservation Information**

City and State: \_\_\_\_\_

Facility Name: \_\_\_\_\_

Address: \_\_\_\_\_

Facility Reservation Phone Number: \_\_\_\_\_

Facility Phone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

Facility Restaurants: \_\_\_\_\_

Exercise Facilities: \_\_\_\_\_

**Lodging Information:**Lodging is required: ☐ Yes ☐ No

If yes, check one:

\_\_\_\_\_ Room reservations have been made for you and lodging costs (no incidentals) will be direct billed to the judicial education organization. Your confirmation number is \_\_\_\_\_.

\_\_\_\_\_ Room reservations have been made for you and you will be required to pay your lodging costs at check-out and later submit a travel voucher for reimbursement. Your confirmation number is \_\_\_\_\_.

\_\_\_\_\_ No lodging is required, if you choose to lodge, the judicial education organization will not reimburse you.

\_\_\_\_\_ Other: \_\_\_\_\_

**Meeting Room Information:**\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_**Facility Transportation Service Information:**

\_\_\_\_\_

(Attach facility brochure, map and directions to facility)

**Presentation Proposal**

**Instructions to Faculty:** Before completing the presentation proposal, consider what kind(s) of teaching aids could be used in your presentation and what kind of meeting room arrangements would create the appropriate learning environment for your session. The reference materials attached to the presentation proposal form (teaching aids, room arrangements, and presentation tips) will help stimulate your thoughts about these considerations. Items 1, 8, 9, and 20 have already been completed by the program planner. All blank sections are to be completed by the faculty member.

1. Judicial education organization staff faculty liaison:

\_\_\_\_\_

2. Topic: \_\_\_\_\_

3. Faculty: \_\_\_\_\_  
(List faculty name as it should appear on the program announcement)

4. Faculty title: \_\_\_\_\_

5. Faculty court, business, or organization name:

\_\_\_\_\_  
(List information as it should appear on the program announcement)

Address: \_\_\_\_\_

\_\_\_\_\_

6. Faculty phone and fax number: \_\_\_\_\_  
(Phone) (Fax)

7. Faculty social security or FEIN number: \_\_\_\_\_

8. Consultant fee as previously agreed upon: \_\_\_\_\_

9. Consultant travel: \_\_\_\_\_  
(Meals) (Lodging) (Transportation)

10. Consultant biographical information:  
(Note: Attach a one-page biographical sketch or resumé)

11. List additional discussion leaders or facilitators (attach additional sheets if necessary):  
(Note: If the names listed below are to appear on the conference announcement, and if these persons will be reimbursed for travel and/or paid a fee, make copies of this form and complete the preceding questions for each person listed, as appropriate.)

\_\_\_\_\_

\_\_\_\_\_

12. Provide the presentation title as it should appear on the program announcement:

---

13. Provide a four or five sentence description of the presentation as it should appear on the program announcement (for more space, attach additional sheets):

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14. Provide the learning objectives of the presentation as they should appear on the program announcement (for more space, attach additional sheets):

---



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15. Provide a topical outline of the presentation:

[illegible]

16. List any problems, issues, concerns you would like to discuss, or audience information you would like to know about in advance of this presentation (for more space, attach additional sheets):

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17. List all audiovisual equipment or teaching aids needed for the presentation (before completing this question, review the room arrangement information sheet):

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

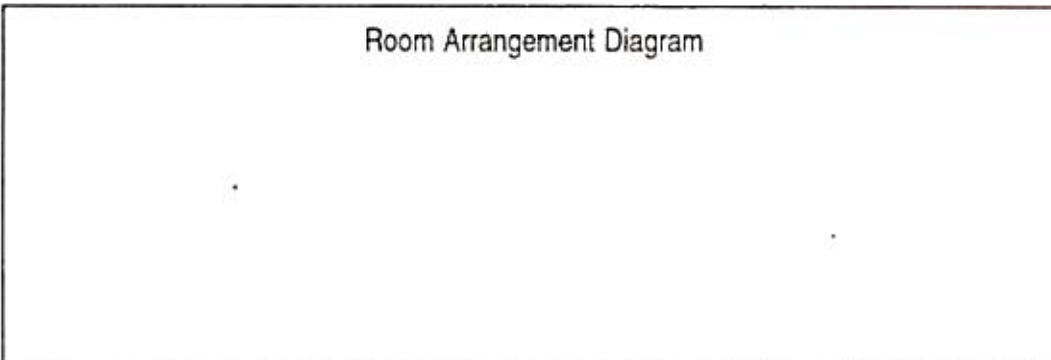
18. Identify room set-up requirements for this presentation. Provide both written instructions and a diagram (before completing this question, review the room arrangement information sheet):

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Room Arrangement Diagram



19. List the expected number of pages for your notebook or handout materials:

<hr/>	<hr/>
(Number of notebook pages)	(Number of handout pages)

20. Explain any special requests or issues that must be addressed prior to the presentation:

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**Room Arrangements**

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**Instructions to Faculty:** Review this room arrangement information before completing questions 17 and 18 on the presentation proposal form.

Room arrangements are important for establishing the learning environment. Criteria for selecting the best room arrangement include:

- **Communication:**  
Communication among and between faculty members and participants is important for the learning environment. The room arrangements should promote the desired communication patterns.
- **Range of Vision:**  
The room arrangements must be suitable for unobstructed view of the faculty, teaching aids, and participants.
- **Instructional Space:**  
The faculty must have instructional space which is unobstructed, provides room for teaching aids, and offers enough tabletop space to layout instructional materials, aids, and supplies.
- **Room Size:**  
Each room arrangement configuration requires different room dimensions to accommodate teaching aids, communication pattern, range of vision, and instructional space.



## Room Arrangements: Classroom Style



### 1. Classroom Style Set-Up

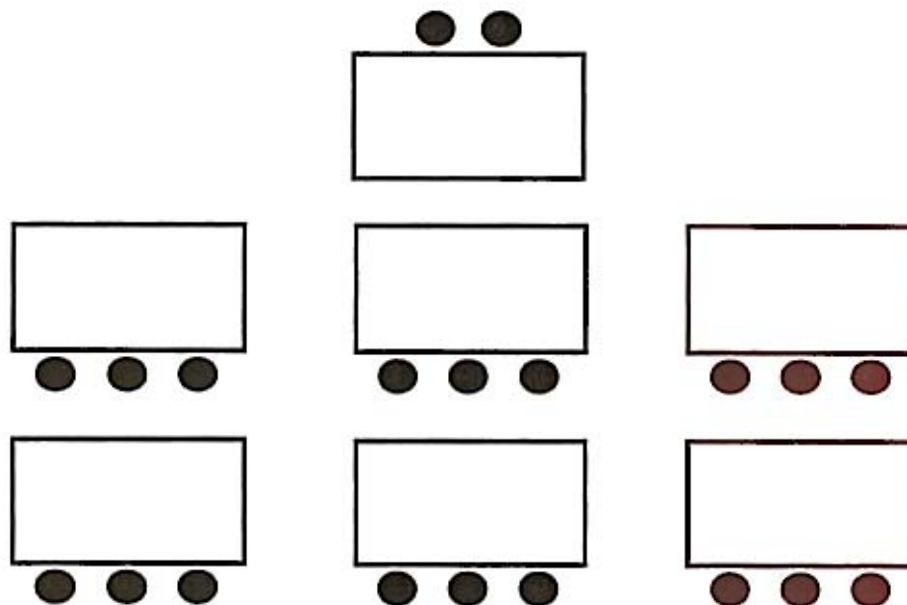
- Tables and chairs
- Tables in front of chairs
- All chairs face one direction

### 2. Classroom Style Advantages

- Participants face focal point
- Good for use of audiovisual equipment
- Good for notetaking
- Discourages personal one-to-one conversations during presentation

### 3. Classroom Style Disadvantages

- Very formal
- Reminiscent of school
- Difficult to rearrange and break into groups
- Inhibits participant interaction
- Implication of speaker authority



Classroom Style Diagram



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## Room Arrangements: Conference Style

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### 1. Conference Style Set-Up

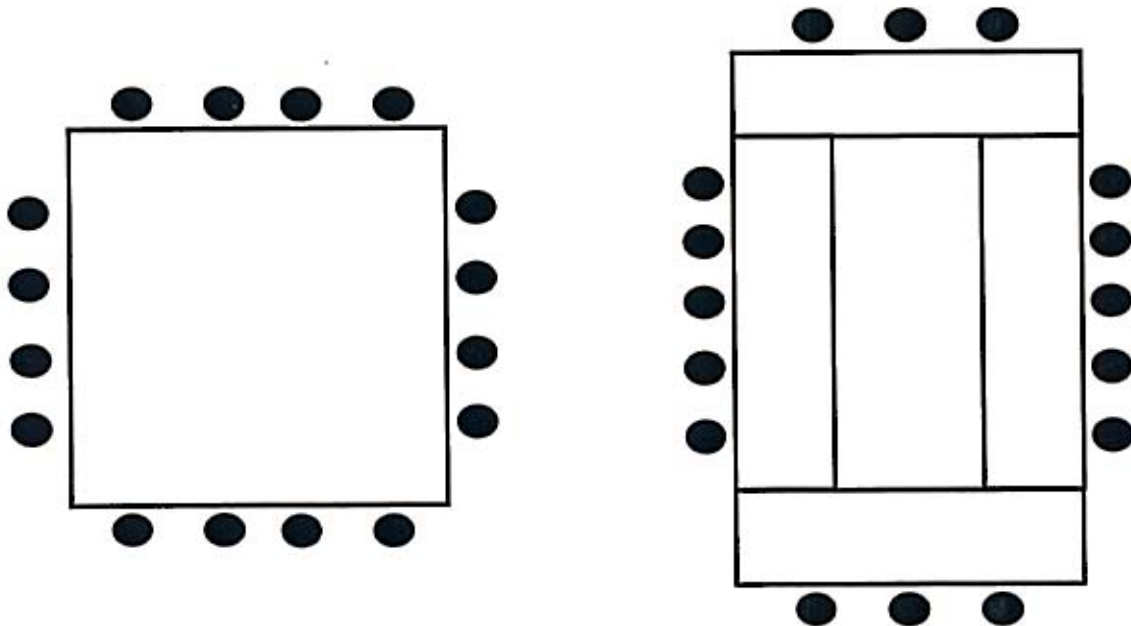
- Tables and chairs
- Chairs arranged around the perimeter of the tables
- Tables may be in a square or oblong shape

### 2. Conference Style Advantages

- Informal
- Encourages participant interaction
- Eases freedom of movement for speaker
- Facilitates small group activity

### 3. Conference Style Disadvantages

- Makes use of audiovisual equipment difficult, if some people have backs to focal point
- Not practical for groups over 25
- Takes large amount of space



Conference Style Diagrams



## Room Arrangements: Theater Style



### 1. Theater Style Set-Up

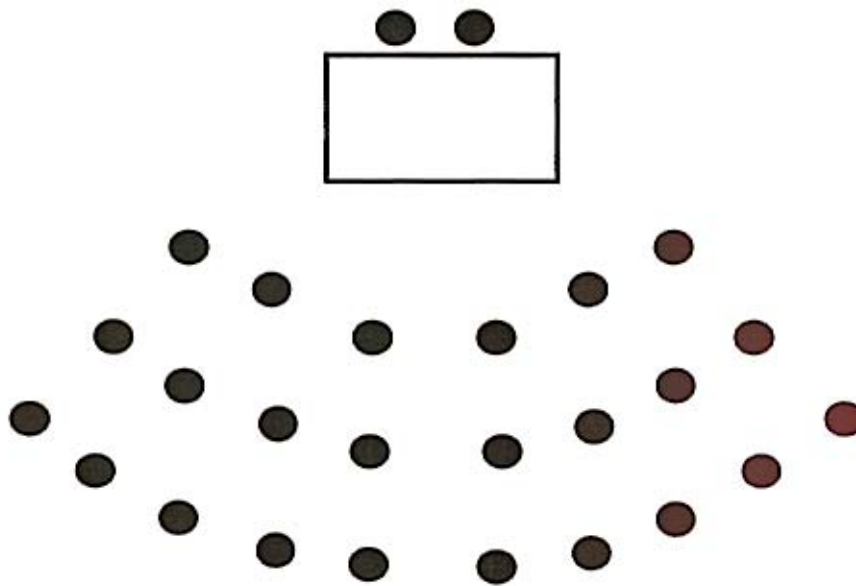
- No tables
- All chairs face one direction

### 2. Theater Style Advantages

- Participants face focal point
- Good for use of audiovisual equipment
- Get large number of people in a relatively small space
- Easy breaking into small groups

### 3. Theater Style Disadvantages

- Uncomfortable for long sessions
- Notetaking made difficult
- Restrictive to participant interaction



Theater Style Diagram



## Room Arrangements: U-Shaped Style



### 1. U-Shaped Style Set-Up

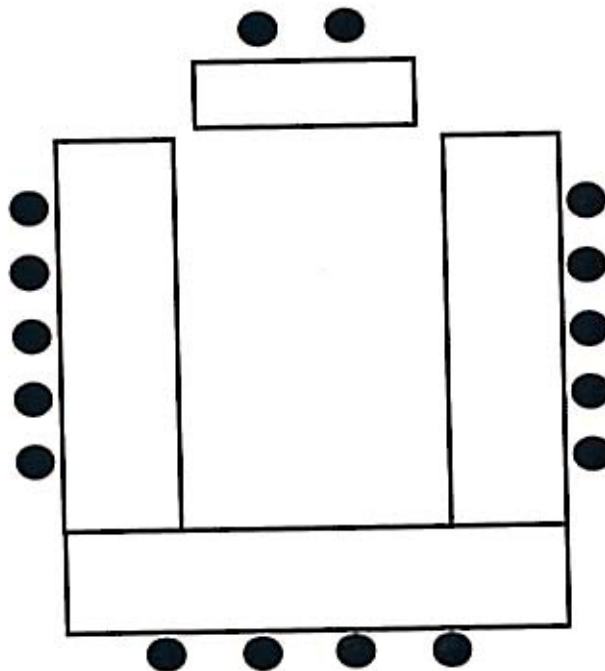
- Tables and chairs
- Tables in front of chairs
- Chairs face each other and front of room as they are arranged around the perimeter of the tables

### 2. U-Shaped Style Advantages

- Participants face each other
- Encourages participant interaction
- Provides ample instruction space
- Good for use of audiovisual equipment

### 3. U-Shaped Style Disadvantages

- Will not accommodate a large number of participants
- Requires a considerable amount of room space



U-Shaped Style Diagram

**Room Arrangements: Rounds Style****1. Rounds Style**

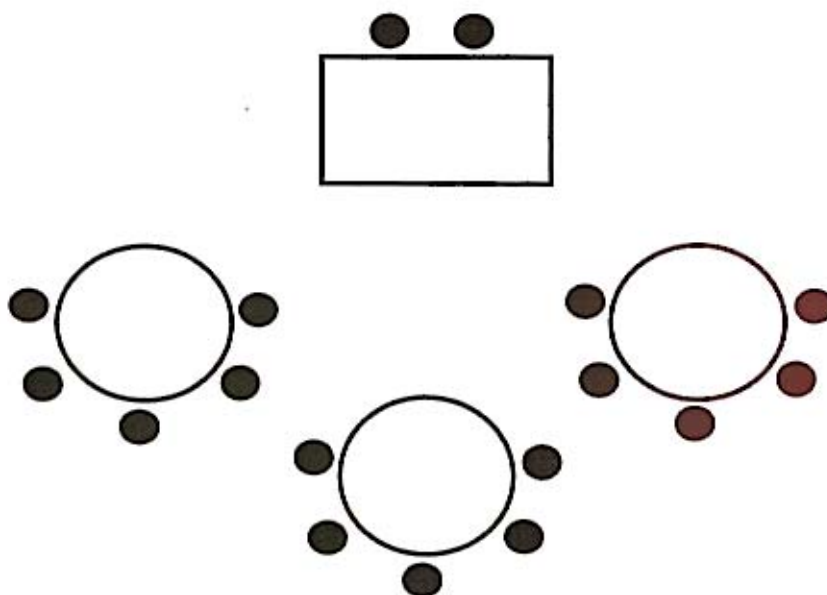
- Round table and chairs
- Chairs face each other around the table

**2. Rounds Style Advantages**

- Participants face each other
- Encourages participant interaction
- Good for small group work

**3. Rounds Style Disadvantages**

- Participants at round tables are isolated from the participants at the other round tables
- Unless chairs are arranged around the tables in half moons, the participants have an obstructed view of the faculty and teaching aids



**Rounds Style Diagram**



## Room Arrangements: Herringbone Style



### 1. Herringbone Style Set-Up

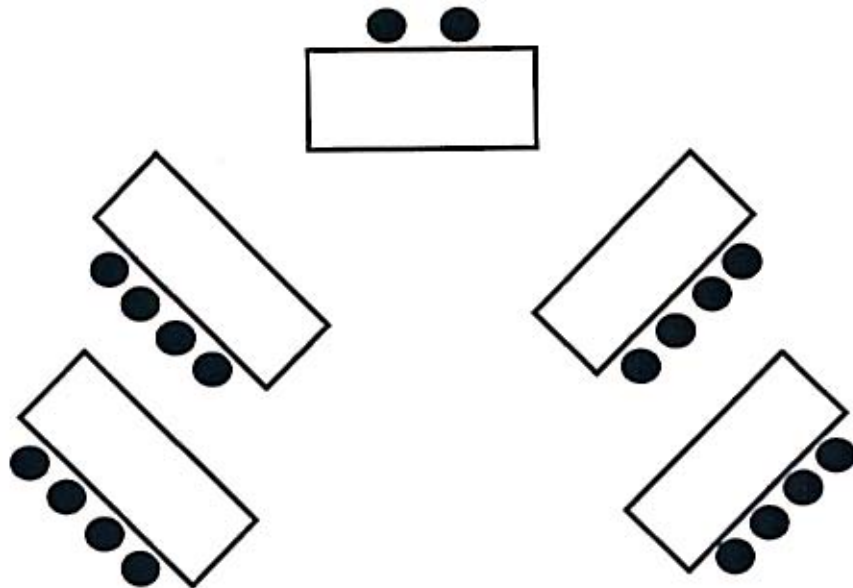
- Tables and chairs
- Tables in front of chairs
- Chairs face in one direction

### 2. Herringbone Style Advantages

- Participants face faculty
- Opens up range of vision between participants
- Good for small group work

### 3. Herringbone Style Disadvantages

- Somewhat formal
- Inhibits full participant interaction
- Focuses solely on the speaker



Herringbone Style Diagram



## Teaching Aids



**Instructions to Faculty:** Teaching aids are tools used to enhance the teaching/learning experience. Audiovisual aids are considered teaching aids and are used to present information which involves attendee hearing and sight. Review this information before you make a decision about the most advantageous way to present your subject matter. After you review the information and before you make your selection, discuss your needs with your planner.

### Criteria for Selecting Teaching Aids

- **Consider Impact:**  
Each type of teaching aid has a specific impact which may or may not complement your subject matter. Know what kind of impact you want to make and select your teaching aid based on that knowledge.
- **Appropriateness:**  
Not every teaching aid is appropriate for the subject matter, group size, and/or room dimensions. Try using a variety of mediums before you make your final choice.
- **Subject Matter:**  
The subject matter to be presented is a main factor to consider when selecting your teaching aids. Make sure that the teaching aid does not detract in any way from the subject matter context, goal, or objective.
- **Audience Size:**  
The number of participants in the audience should always be considered when choosing teaching aids. Certain teaching aids are only appropriate for very small groups. Know your group size before you make your final selection.
- **Availability:**  
A major consideration in the selection of your teaching aid is availability of equipment, its cost, and mobility. Discuss these considerations with your program planner before you make decisions about the style, pace, and visual impact of your presentation.
- **Reliability:**  
Technology is impacting the variety and quality of teaching aids that are available. Check on the reliability of the aid from other users or from your program planner.
- **Easy to Use:**  
Make sure you know how to use the visual aid you have selected and feel comfortable with it. Any difficulties with the visual aid will interfere with your presentation and may diminish its impact.



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## **Teaching Aids: Overhead Transparencies**

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### **1. Subject Matter Considerations When Using Overhead Transparencies**

- Emphasizes highlights
- Emphasizes key words
- Provides bold illustration
- Makes information on charts and graphs easier to present
- Overheads can be duplicates of training materials

### **2. Audience Considerations When Using Overhead Transparencies**

- Good for small or medium size groups; can be used for bigger groups if a large projection screen is available
- Room set-up must allow for viewing
- Meeting room lights remain on allowing for notetaking by participants
- Use 18 point font size or larger on all overheads

### **3. Impact of Using Overhead Transparencies**

- Reinforces key aspects of all subject matter
- Usually displays the progression of the presentation

### **4. Equipment Needed**

- Screen
- Overhead projector
- Prepared and blank overheads
- Projector stand
- Overhead markers (permanent and water soluble)

### **5. Presentation Tips**

- Face audience
- Turn lamp off when changing overheads (unless it disrupts flow of presentation) and when taking long breaks in presentation
- Keep spare bulb
- Presentation notes on cardboard frame (if frames are used)
- Sequence overheads prior to presentation

### **6. Preparation Reminders**

- Overheads are relatively inexpensive when purchased by the box
- Available in several varieties: write-on film for hand-lettering; duplication film, which can be used in high speed copiers; revelation film, which is dark blue and when using a special pen, the dark blue disappears leaving lines/letters/drawings; color film in full sheets; color adhesive film, which can be applied for accent



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## Teaching Aids: Slides

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### 1. Subject Matter Considerations When Using Slides

- Depicts real situations
- Emphasizes key words
- Charts and graphs easier to present

### 2. Audience Considerations When Using Slides

- Good for small or medium size groups; can use for bigger groups if large screen projection is possible
- Room set-up must allow for viewing
- Meeting room lights are turned off making notetaking impossible

### 3. Impact of Using Slides

- Real life situations are brought into the session
- Makes presentation more dynamic as slides depict action, variety of colors are used, etc.

### 4. Equipment Needed

- Screen
- Slide projector with carousel
- Stand
- Remote control
- Laser pointer, optional

### 5. Presentation Tips

- Use black "break indicator" slide between sequences
- Leave fan running without light when finished
- Be familiar with slide sequence and purpose and meaning of each slide

### 6. Preparation Reminders

- 35mm film and processing can be expensive
- Advanced time is needed to develop and prepare slide presentations, unless using a commercially developed slide presentation



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## **Teaching Aids: Flip Charts/Posters**

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### **1. Subject Matter Considerations When Using Flip Charts/Posters**

- Can rapidly list participants thoughts and feedback
- Can record key items and points to return to later in the program
- Emphasize key words

### **2. Audience Considerations When Using Flip Charts/Posters**

- Good for groups no larger than 25-30
- Room set-up must allow for viewing
- Post sheets for viewing and future use
- Room remains lighted during use
- Participants can easily use flip charts/posters

### **3. Impact of Using Flip Charts/Posters**

- Captures spontaneous participant/faculty interaction
- Remains in view
- Increases participant involvement

### **4. Equipment Needed**

- Paper
- Easel
- Markers in a variety of colors

### **5. Presentation Tips**

- Print large and legible
- Use a variety of color markers
- Use lined paper
- For presentation of key issues or points, prepare flip chart/poster items in advance
- Use more than one flip chart (one for prepared material and one for recording participant feedback)

### **6. Preparation Reminders**

- Takes little to no time
- Is relatively inexpensive



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**Teaching Aids: 16MM Films/Videos**

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**1. Subject Matter Considerations When Using 16MM Films/Videos**

- Provides the story line
- Provides action
- Gives real life demonstration
- Conveys a great deal of information in a relatively short time

**2. Audience Considerations When Using 16MM Films/Videos**

- When using 16MM film, projection can be made large, thus group size is not a problem. Group size becomes an issue when using videos. If the group is large, several monitors must be placed strategically around the room so that all participants have an unobstructed view.
- Room set-up must allow for viewing
- Meeting room is dark, thus prohibiting notetaking

**3. Impact of Using 16MM Films/Videos**

- Brings real life situations into the session
- Provides action

**4. Equipment Needed**

- Video:
- Camera (depending on kind of equipment)
  - Playback unit 1/2" or 3/4"
  - TV monitor
  - Stand

- 16MM:
- Projector
  - Screen
  - Stand

**5. Presentation Tips**

- Queue-up to start
- Move around room to check viewing/sound
- Be familiar with equipment

**6. Preparation Reminders**

- Filming is expensive and usually beyond the scope of most judicial education organizations
- Videotaping can usually be done, but the equipment is expensive and quality is often hard to achieve
- Private companies, colleges, and universities will, for a fee, produce high-quality videotapes



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**Presentation Tips**

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**Instructions to Faculty:** Review the following 18 tips when preparing the content, flow, and presentation methods for your session.

**1. Prepare**

State your goals and objectives, know your purpose, and plan your activities.

**2. State the Session Purpose**

Participants need to know what is expected of them.

**3. Limit Information**

Outline your presentation, cover key points, and condense and summarize information. Too much information often confuses participants.

**4. Speak in a Conversational Manner**

Use notes, an outline, or key points to remind you of the information to be covered. Reading from a prepared paper eliminates communication between you and your participants.

**5. Make Eye Contact with Participants**

This allows you to determine how engaged the participants are in your presentation. It is also a sign of trust and interest.

**6. Punctuate Points or Transitions**

Use an illustration, a transitional activity, a summary, or a short film to indicate transition from one focus to another. Be conscious to connect all segments of your presentation.

**7. Plan For Participation**

Ask open-ended questions and solicit personal examples to illustrate a point. Involvement of participants is key to a successful presentation.

**8. Use Teaching Aids**

Involving more than the sense of hearing reinforces material being presented, makes remembering easier, and clarifies your point(s). Use a variety of aids but only to enhance your information, not for the sake of using aids.

**9. Break Material Into Short Units**

After 30 to 45 minutes of presentation, insert an activity or ask questions. This allows participants time to assimilate information already presented and makes further presentations more meaningful.

**10. Know Your Environment**

Be familiar with the room, seating arrangements, participant composition, and check your equipment. All of these affect the success of your presentation and should be factored into your teaching plan.

**11. Make Information Relevant**

Use examples, illustrations, case studies, discussion groups, and other means to make the information presented relevant to participants.

**12. Move Into the Audience**

Moving into the participants seating area builds trust, creates a friendly atmosphere, and makes everyone more comfortable. If done appropriately, it can lessen the feeling of authority often present in an educational setting.

**13. Use Attendee Comments to Further Your Progress**

When asking open-ended questions, be alert to comments that can serve as stepping stones in your presentation. This makes participants feel good about themselves and serves as a transition point for you.

**14. Avoid Traditional Barriers**

Adults often identify traditional items as signs of authority and barriers to the two-way communication that is so important in adult education. Avoid the use of the lectern and podium (unless using them to hold your notes or aids), while you move into your audience and remain in view. Avoid use of the chalkboard, unless it is the only aid available. Avoid use of terms such as *test* and *student* which have a negative impact on adults.

**15. Use Gender Neutral Language**

Avoid using the male pronoun when intention is to refer to both men and women. Avoid stereotyping roles. Avoid occupational terms that apply to one sex.

**16. Be Sensitive to Diversity Issues**

When delivering your presentation and engaging in discussion, be conscious of the probable diversity of opinions, beliefs, values, lifestyles, races, and ethnic groups represented within your audience.

**17. Practice and Time Your Presentation**

Read your presentation notes or outline, adding conversational comments, giving examples, etc. Keep going over your material until you feel comfortable with the content. Time yourself, estimate activity time, make whatever adjustments that are necessary so that all key points can be covered in the allotted time frame.

**18. Be Yourself and Have Fun**

Develop a style and method of presentation that is comfortable for you. Relax and enjoy the reciprocal learning that takes place between you and the participants.



## Teaching Aid Request



**Instructions to Faculty:** Complete one teaching aid request form for each teaching aid needed for your presentation. Submit this form and attach any examples by the deadline to your program planner or other designated judicial education staff.

Date Submitted: \_\_\_\_\_ Date Needed: \_\_\_\_\_  
 Faculty Name: \_\_\_\_\_ Program Name: \_\_\_\_\_  
 Session Title: \_\_\_\_\_

### TEACHING AID DESCRIPTION

### FOR STAFF USE ONLY

Date Completed: \_\_\_\_\_ Total Hours for Completion of Request: \_\_\_\_\_  
 Education Staff Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 Project Approved and Received By: \_\_\_\_\_

**Duplication Request**

**Instructions to Faculty:** Complete one duplication request form for each set of materials submitted. Please indicate any instructions you have about the duplication of your materials on the lines designated for special instructions. Submit this form to your program planner or other designated judicial education staff.

Faculty Name: \_\_\_\_\_

Session Title: \_\_\_\_\_

Program Name: \_\_\_\_\_

Date Submitted: \_\_\_\_\_ Date Needed: \_\_\_\_\_

Special Instructions (check as many as apply):

☐ Single Side

☐ Staple

☐ Double Side

☐ 3 Hole Punch

☐ Special Colors (explain): \_\_\_\_\_

**Please attach a copy of the materials you are submitting for handouts. Staff members will:**

1. Provide formatting (if necessary), a cover, page numbers, etc.
2. Duplicate in appropriate numbers
3. Deliver materials to the program for distribution at your session

**You will be mailed a final copy of your material prior to the program.**

**Note:** A copy of any material to be distributed at the program, whether to be duplicated by this organization or not, must be submitted with this form for inclusion in the program file.

**Check One:**

- ☐ A copy of the material is attached, duplication is hereby requested.
- ☐ A copy of the material is attached, duplicate but do not put in program materials to be distributed.
- ☐ A copy of the material is attached, duplication is not necessary. I am bringing all necessary copies.
- ☐ No material will be distributed at my session.

**Duplication Instructions — For Staff Use Only**

<input type="checkbox"/> Single Side	<input type="checkbox"/> Staple	<input type="checkbox"/> Notebook Assembly
<input type="checkbox"/> Double Side	<input type="checkbox"/> 3 Hole Punch	<input type="checkbox"/> Special Colors (explain):
Date Submitted:	Date Needed:	Return To:
Other Special Instructions:		



## Faculty Meeting Agenda



**Instructions to Faculty:** Review this agenda prior to the meeting. Please be prepared to discuss your topic. Additionally, whatever questions you have about this program can be addressed at the faculty meeting.

{location}  
{date}

### I. Welcome

### II. Introduction

### III. Program Overview

- A. Program Agenda
- B. Pre-planning
  - 1. Program Plan (Review)
  - 2. Faculty Biographical Information (Review)
  - 3. Teaching Aids
  - 4. Materials
  - 5. Participants
    - a. Categories
    - b. Number expected
    - c. Roster
  - 6. Break Schedule
    - a. Location/Timing
    - b. Beginning/Ending Signals
  - 7. Staffing (brief explanation)
- C. Facility
  - 1. Floor Plan
  - 2. Room Dimensions
  - 3. Room Capacity
  - 4. Tour
- D. Program Announcement
  - 1. Theme
  - 2. Format
  - 3. Information Offered
- E. Registration
  - 1. Procedure
  - 2. Deadline
- F. Time Lines for Faculty (written)

### IV. Individual Work Time

### V. Principles of Adult Education (if applicable)



## Final Faculty Letter



**Instructions to Program Planner:** This is the final written communication with the faculty prior to the program. Make sure all information is correct and complete.

{date}

{title, first name, last name}

{position}

{address}

{city, state zip code}

Dear {title} {last name}:

As the program approaches, I would like to provide you with final information and remind you of some important program related matters.

Enclosed for your CAREFUL REVIEW are:

- Faculty guidelines
- Copy of your session materials, if applicable
- Paper copy of teaching aids (i.e. overhead transparencies), if applicable;  
actual materials will be provided to you at the program
- Meeting logistical information

Enclosed for your INFORMATION are:

- Program site/facility information
- Copy of your participant list
- Final program agenda, please note breaks
- Program brochure

Program registration is complete and participants are notified of their session assignments. If I can be of further assistance to you, please contact me. Otherwise, I look forward to seeing you as you check-in at the program registration table.

Sincerely,

{planner's name}

{title}

Enclosures



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**Faculty Guidelines**

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**Instructions to Faculty:** Please review immediately. If you have any questions, call the program planner.

Faculty Name: \_\_\_\_\_

Staff Name: \_\_\_\_\_

**To Be Done Now:**

1. Review the meeting room logistical information for your session to verify date, time, room assignment, requested equipment, material status, seating arrangement, etc.
2. Review the copy of your handout material (if applicable) for correctness. Remember any/all material must be submitted (whether to be duplicated by this organization or not) for the file prior to the program.
3. Review the paper copy of overhead transparencies (if applicable) for correctness.
4. Notify me of any problems, errors, etc. by \_\_\_\_\_. If no changes are requested, materials will be produced as enclosed and will be at the program site in appropriate numbers.

---

**To Be Done At The Program:**

1. Arrive 45 minutes prior to your session.
2. Check-in at the program registration table where you will receive:
  - Your name tag
  - Your faculty packet containing:
    - opening remarks for the session
    - agenda
    - hotel map
    - expense reimbursement form
  - Teaching aids prepared for you (e.g. overhead transparencies)
  - Program notebook or handout materials
3. Check your session room to verify location and set-up.
4. Meet briefly in your assigned room with the individual designated to staff your session. This individual will assist you and facilitate sign-in and evaluation procedures.
5. Your staff person will introduce you using the biographical information provided by you.
6. Open and close your session on time:
  - Your staff person will close the session room door at times designated for session to begin or reconvene
  - Your staff person will open the door at the scheduled breaks and session conclusion
7. Make opening remarks (to be given to you at the program) and begin your session.
8. Notify your staff person if you need assistance or encounter any problems.

**Meeting Room Logistical Information**

**Instructions to Faculty:** This information was submitted to the facility for your meeting room arrangements. Contact your program planner if you have any questions.

1. Program Name: \_\_\_\_\_
2. Date of Program: \_\_\_\_\_
3. Session Title: \_\_\_\_\_
4. Session Date: \_\_\_\_\_
5. Session Time: \_\_\_\_\_
6. Facility Name: \_\_\_\_\_
7. Meeting Room: \_\_\_\_\_
8. List of Audiovisual Equipment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

9. ADA Requirements (see attached list for those ADA Requirements which will be observed for your session)

10. Room Set-Up:

## **Phase 2: On-Site Faculty Management**

On-site faculty management is focused on the details that ensure everything and everyone are appropriately located and on schedule so that the faculty can deliver their presentations as planned.

Depending on the length of the program, number of sessions, and group size, the planner may have additional staff assistance. The planner must prepare the program staff for their responsibilities during the program. This preparation can be accomplished by providing the staff with an on-site program duties checklist which identifies those tasks for which they are responsible. The checklist is on page 58. The checklist tells the staff when and where they are needed and what they are expected to do. If the planner has no program staff (or temporary assistants), then the planner is responsible for all tasks.

### **First Task: Take Items to Session Room**

On-site faculty management requires that evaluation forms; certificates of attendance; sign-in sheets; name tags; logistical information forms; handouts; evaluation bins; reserved seating signs; program kits containing items such as markers, transparency pens, tape, clips, etc.; session signs; and certificates of completion (if any) be picked up at the registration table and taken to the meeting room approximately one hour before the session begins.

### **Second Task: Complete Session Room Set-Up**

Once at the room, all equipment should be checked to make sure it is in working order. This includes the public address system, heating and air conditioning system, and lighting controls. This should be done early enough to correct problems. The room set-up should be checked against the meeting room logistical information form. Verify room accessibility and any previously ordered accommodations for persons with disabilities under the ADA. The sign-in table must be arranged, the faculty and participants must be greeted and assisted, and additional chairs must be obtained (if necessary) to accommodate all participants.

### **Third Task: Begin the Session**

When it is time for the session to begin, the program staff person closes the meeting room door, makes any necessary remarks on logistics, and introduces the faculty so the session can begin.

#### **Fourth Task: Monitor Breaks**

At the breaks, the program staff person signals the faculty and opens the meeting room door. At the end of the break, the staff person signals the faculty and participants to return to the session and closes the meeting room door.

#### **Fifth Task: Close the Session**

At the end of the session, the staff person distributes program evaluation forms and certificates of attendance to the participants (if applicable), provides additional logistical information, thanks the faculty and indicates that compiled evaluation results will be forthcoming, and gathers all program items and returns them to the registration table.

#### **Sixth Task: Staff Evaluation of Faculty**

During the session, the staff person has the important responsibility of evaluating the faculty performance. The staff evaluation is primarily for internal use to debrief the faculty on the qualities of the program. The judicial education staff evaluation form of faculty is on page 60.

★ Forms for On-Site Faculty Management* ★	
Form Name	Page Number
On-Site Program Duties Checklist	58
Judicial Education Staff Evaluation of Faculty	60

\*All forms are samples to be adapted as needed to fit the judicial education organization.



## On-Site Program Duties Checklist



**Instructions to Program Planner or Designated Assistants:** This form provides you with the list of program duties for which you are responsible. Please review prior to the program.

**1. Check in at registration table by \_\_\_\_\_:**  
(time)

- ☐ Receive packet of information containing
  - Written description of duties
  - Meeting room logistical information and ADA requirements list
  - Agenda
  - Hotel and vicinity maps
  - Restaurant list (if applicable)
  - Evaluation forms
  - Certificates of attendance
  - Session sign-in sheets
- ☐ Receive name tag
- ☐ Receive program kit

**2. Meet with planner and review assignments:**

- ☐ Review duties
- ☐ Discuss the day's activities
- ☐ Receive special instructions

**3. Arrive in session room and begin set-up:**

- ☐ Verify room arrangement on meeting room logistical information forms
- ☐ Verify room accessibility and any previously ordered accommodations for faculty and participants with disabilities
- ☐ Verify equipment on set-up forms; make sure equipment is operational, including the public address system, heating and air conditioning, and lights
- ☐ Obtain access to additional chairs
- ☐ Report inconsistencies to planner
- ☐ Set up sign-in table
  - Place signs on table
  - Place sign-in sheet on clipboard, with pens
  - Place name tags on table with markers nearby
  - Place session materials on table
  - Place evaluation bin on table

- ☐ Place "reserved seating" signs on tables or in chairs
- ☐ Place program kit in convenient but private location
- ☐ Place session sign on easel outside session door (and at other locations, as necessary)

**4. Greet and assist faculty and participants:**

- ☐ Introduce yourself to the faculty member(s)
- ☐ Explain your role
- ☐ Verify that faculty member(s) have checked-in at program registration table
- ☐ Provide assistance as needed
- ☐ Monitor participant sign-in
- ☐ Assist participants not listed on sign-in sheet
- ☐ Refer participants paying fees to program registration table

**5. Monitor session (start, break, and end session):**

- ☐ Introduce faculty
- ☐ Close door at session start time and as breaks end
- ☐ Open door at break or ending time
- ☐ Remind faculty to distribute evaluation forms (or distribute them yourself at the last break)
- ☐ Distribute certificates of attendance at session conclusion (and at no other time)
- ☐ Monitor submission of evaluations
- ☐ Close session by thanking the faculty
- ☐ Tell faculty that the compiled evaluation results will be sent to them
- ☐ Gather materials
- ☐ Place completed evaluation forms, extra certificates of attendance, etc. in session envelope and turn in at conference registration table

**6. Conduct on-site faculty evaluation:**

- ☐ Use judicial education staff evaluation of faculty form
- ☐ Place completed form in session envelope and turn in at conference registration table

**Judicial Education Staff Evaluation of Faculty\***

**Instructions to Program Planner or Designated Staff:** Answer the following evaluation questions. Your comments will be used to assist in the improvement of faculty teaching skills.

Instructor's Name: \_\_\_\_\_

Session Title: \_\_\_\_\_

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

1. Knowledge of the subject matter?

Inadequate

[ ] 1

[ ] 2

[ ] 3

[ ] 4

Excellent

[ ] 5

2. Organization of the presentation?

Disorganized

[ ] 1

[ ] 2

[ ] 3

[ ] 4

Well Organized

[ ] 5

Comments: \_\_\_\_\_

\_\_\_\_\_

3. Choice of issues discussed?

All were

Unimportant

[ ] 1

[ ] 2

[ ] 3

[ ] 4

All were

Important

[ ] 5

Comments: \_\_\_\_\_

\_\_\_\_\_

4. Manner of presentation?

Dull

[ ] 1

[ ] 2

[ ] 3

[ ] 4

Very Interesting

[ ] 5

Comments: \_\_\_\_\_

\_\_\_\_\_

(Page 1 of 3)

\*This evaluation form was adapted from evaluation forms previously published in *Judicial Education Needs Assessment and Program Evaluation: JERITT Monograph One* (Hudzik, 1991).

5. Encouragement of participants to ask questions, disagree, and express their ideas (if applicable in session format)?

None				Great
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

Comments: \_\_\_\_\_  
 \_\_\_\_\_

6. Answers to participants' questions?

Not Helpful				Very Helpful
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

Comments: \_\_\_\_\_  
 \_\_\_\_\_

7. Overall teaching ability?

Unsatisfactory				Excellent
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

Comments: \_\_\_\_\_  
 \_\_\_\_\_

8. Explanation of the session purpose.

Unsatisfactory				Excellent
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

Comments: \_\_\_\_\_  
 \_\_\_\_\_

9. Review of the session objectives.

Unsatisfactory				Excellent
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

Comments: \_\_\_\_\_  
 \_\_\_\_\_

10. Use of or reference to written teaching materials.

Unsatisfactory

Excellent

☐ 1

☐ 2

☐ 3

☐ 4

☐ 5

Comments:

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11. Use of audiovisual equipment.

Unsatisfactory

Excellent

☐ 1

☐ 2

☐ 3

☐ 4

☐ 5

Comments:

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---

12. Ability to establish an open and comfortable teaching environment.

Unsatisfactory

Excellent

☐ 1

☐ 2

☐ 3

☐ 4

☐ 5

Comments:

---

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## **Phase 3: Post-Program Faculty Management**

Post-program faculty management is a comparatively uncomplicated matter.

### **First Task: Send Faculty Appreciation Letter**

The planner sends an appreciation letter to the faculty which includes the compiled participant evaluation results and the faculty evaluation form. The faculty evaluation form should be completed by the faculty member within one to three weeks following program completion. This allows faculty to evaluate the program and judicial education organization services provided to him or her. This faculty evaluation form is returned to the planner and used to strengthen future program planning and management processes.

### **Second Task: Conduct Post-Program Faculty Meeting**

If another offering of the same program is scheduled, a post-program faculty meeting is often held to review all evaluation results so that appropriate adjustments can be made to the program before it is offered again. Usually faculty are notified of this meeting in the appreciation letter. If a follow-up faculty meeting is not held, then faculty management ends at that point.

The sample appreciation letter, participant program evaluation form, and faculty program evaluation form are on pages 65, 66, and 70.

★ Forms for Post-Program Faculty Management* ★	
Form Name	Page Number
Appreciation Letter	65
Participant Program Evaluation	66
Faculty Program Evaluation	70

\*All forms are samples to be adapted as needed to fit the judicial education organization.



## Appreciation Letter



**Instructions to Program Planner:** Send the appreciation letter to all faculty members following the program.

{date}

{title, first name, last name}

{position}

{address}

{city, state zip code}

Dear {title, last name}:

On behalf of the participants, planning committee, and {name of organization}, I would like to thank you again for serving as faculty for the {program title}. The program was a success due to the level of expertise and commitment made by the faculty.

Enclosed is a compilation of the participant evaluations for your session(s). This compilation is offered as feedback and as a planning tool for future programs.

Also enclosed is a faculty program evaluation form asking for your feedback regarding the program. The information you provide will assist us as we make future plans. Please take a few minutes to respond to the survey and return it in the enclosed envelope by {date}.

It was a pleasure to have worked with you.

Sincerely,

{name}

{title}

Enclosures



## Participant Program Evaluation\*



**Instructions to Participants:** Please complete this evaluation and place it in the evaluation bin on the sign-in table. Your input is appreciated and will be used in planning future programs.

## Part I. General Reactions

1. Overall, the program's content (topics and substance) was:

☐ Excellent    ☐ Very Good    ☐ Good    ☐ Fair    ☐ Poor

2. Regardless of the topics' interest and value to you, how would you rate the quality of the instructors' presentations?

	Excellent	Very Good	Good	Fair	Poor
Instructor's Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Instructor's Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Instructor's Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Please provide any specific comments you may have regarding your answers to the questions above.

---



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## Part II. Reactions to Specific Topics

Questions 4 through 13 ask you to consider several aspects of each of the major topics presented during the program.

4. How much did the program add to your knowledge of each of the topics listed below?

	I know as much now as before	I have learned some additional things	I have learned a great deal more
Topic A, Instructor, Tues. A.M.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Topic B, Instructor, Tues. A.M.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Topic C, Instructor, Tues. A.M.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(Page 1 of 4)

\*This evaluation form was adapted from evaluation forms previously published in *Judicial Education Needs Assessment and Program Evaluation: JERITT Monograph One* (Hudzik, 1991).

5. How would you rate each topic on personal interest and value to you on your job?

	No personal interest or job value	Personally interesting but no job value	No personal interest but of job value	Has both personal interest and job value
Topic A, Instructor, Tues. A.M.	[ ]	[ ]	[ ]	[ ]
Topic B, Instructor, Tues. A.M.	[ ]	[ ]	[ ]	[ ]
Topic C, Instructor, Tues. A.M.	[ ]	[ ]	[ ]	[ ]

6. Overall, the quality of the instructors' presentations (clarity, pace, etc.) were:

	Excellent	Very Good	Good	Fair	Poor
Topic A, Instructor, Tues. A.M.	[ ]	[ ]	[ ]	[ ]	[ ]
Topic B, Instructor, Tues. A.M.	[ ]	[ ]	[ ]	[ ]	[ ]
Topic C, Instructor, Tues. A.M.	[ ]	[ ]	[ ]	[ ]	[ ]

7. How would you rate the overall quality of the program materials?

	Excellent	Very Good	Good	Fair	Poor
Topic A, Instructor, Tues. A.M.	[ ]	[ ]	[ ]	[ ]	[ ]
Topic B, Instructor, Tues. A.M.	[ ]	[ ]	[ ]	[ ]	[ ]
Topic C, Instructor, Tues. A.M.	[ ]	[ ]	[ ]	[ ]	[ ]

8. How much additional information do you feel that you need about the topics presented in the program?

	No need for the topic in the first place	No need for addi- tional information	Need some addi- tional information	Need much addi- tional information
Topic A, Instructor, Tues. A.M.	[ ]	[ ]	[ ]	[ ]
Topic B, Instructor, Tues. A.M.	[ ]	[ ]	[ ]	[ ]
Topic C, Instructor, Tues. A.M.	[ ]	[ ]	[ ]	[ ]

9. How much did you know about each of the topics listed below before you attended the program

	I knew nothing	I knew a fair amount	I knew a great deal
Topic A, Instructor, Tues. A.M.	[ ]	[ ]	[ ]
Topic B, Instructor, Tues. A.M.	[ ]	[ ]	[ ]
Topic C, Instructor, Tues. A.M.	[ ]	[ ]	[ ]

10. Regardless of your personal feelings about the program's topics, what is the likelihood that you will implement changes along the lines suggested in the presentations?

	No changes likely	Minor changes likely	Major changes likely
Topic A, Instructor, Tues. A.M.	[ ]	[ ]	[ ]
Topic B, Instructor, Tues. A.M.	[ ]	[ ]	[ ]
Topic C, Instructor, Tues. A.M.	[ ]	[ ]	[ ]

11. Comments:

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12. List any topics you would like to see added to this program if it were offered again.

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13. List any topics you would like to see dropped from this program if it were offered again.

---

---

### Part III. Background Information

**Your responses to the questions below will be kept strictly confidential.** However, to help us better interpret the meaning of your responses, it will be very helpful if you provide the following information about yourself.

14. What is your current job title? \_\_\_\_\_
15. How long have you held this position? \_\_\_\_\_
16. Your court may best be described as (check one):
- ☐ A court of limited jurisdiction
  - ☐ A court of general jurisdiction
  - ☐ A juvenile or a probate court
  - ☐ An appellate court
  - ☐ Other (please specify) \_\_\_\_\_
17. About how many employees are there in your court? (check one)
- ☐ Less than 10
  - ☐ 10 to 25
  - ☐ 26 to 50
  - ☐ 51 to 100
  - ☐ More than 100
18. Your name (*Optional*): \_\_\_\_\_

**Faculty Program Evaluation\***

**Instructions to Faculty:** Please complete this form and return it to your program planner.

Name: \_\_\_\_\_

Session/Topic: \_\_\_\_\_

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

1. My assessment of the program as a whole was:
2. Staff support before the program was:
3. Staff support at the program was:
4. Timelines, forms, meetings, correspondence were:
5. The number of participants in my session were (check one):  

☐ Too Many

☐ Too Few

☐ Ideal
6. Impressions of my session were as follows:
  - a) Participants were:
  - b) The room, equipment, etc. were:
7. I would make the following changes if I were asked to teach this topic again to this audience?

\*This evaluation form was adapted from evaluation forms previously published in *Judicial Education Needs Assessment and Program Evaluation: JERITT Monograph One* (Hudzik, 1991).

## **Chapter 4: Facility Selection and Management**

Facility selection and management is as important as curriculum development and faculty selection and management. Just as the curriculum must address the needs of the participant and faculty must possess the appropriate knowledge and skill, the facility must provide the appropriate physical environment in which learning can occur. A good program at an inadequate facility can be as problematic as an inadequate program in a good facility.

### **First Task: Considerations for Facility Selection**

Most judicial education organizations provide a variety of training programs which have different audience needs and different program needs. Therefore, while the planner is searching for the perfect facility for one certain function, screening can also take place for other future programs. Maintaining extensive and current facility files allows the planner to use that information during program development when decisions are being made about program content and facility needs. Also having facility information readily available reduces the time it takes for the planner to complete the details of the logistical arrangements.

Regardless of whether the planner is selecting a facility for one program or the entire program year, several factors should be considered before facility selection begins. Geographic considerations, audience considerations, type of program, and expected number of participants must be identified so that there is a match between peoples' needs and program needs. A facility selection checklist which addresses all of these factors is on page 78. The next step in facility selection is contacting the facility.

### **Second Task: Contact Facilities**

Once the planner has established criteria for facility selection, contact with the facilities can begin. Facility contact can take place in a variety of ways, typically beginning with phone contacts, site visits, and sales calls.

#### **1. Phone Contact**

Planners often make their initial contact with a facility by phone. Usually the contact is with the sales representative. During this initial conversation, the planner identifies program dates, program needs, audience characteristics, and cost considerations so that the sales representative understands the kind of services desired by the planner.

The sales representative will ask the planner to estimate lodging, meeting room, and food service requirements during this first contact; particularly if the call is about specific programs. The sales representative should be able to provide the planner with information on the availability of lodging rooms and meeting rooms along with cost estimates. Many times the planner will reserve the space at the time of contact pending a site visit or review of the facility portfolio.

## **2. Site Visit**

An unannounced site visit allows the planner to see the facility and experience its services from the front desk to dining without being identified as a sales client. Planners often will meet with the sales and catering departments only after they have spent some time at the facility. One potential problem when conducting an unannounced site visit is that the facility representative may not be available for a meeting.

The facility survey checklist, which is on page 81, will aid the planner in making a thorough assessment of the facility and its ability to meet the planner's program needs. The site visit should include a review of the sleeping rooms, meeting rooms, food service, medical/emergency services, security, loading areas, reservation services, accounting services, and accessibility for persons with disabilities in accordance with requirements of the Americans with Disabilities Act (ADA). Ask whether the facility is fully accessible and check for an accessible entrance, elevator, door widths, and restrooms. Often, local disability groups can assist with a survey or can comment on the facility's accessibility. It is essential that the planner select only facilities that are accessible. Conducting an ADA screening prior to reserving the facility avoids later complications for the facility, participants, faculty, and planner.

If available, the planner should take a camera or video recorder along on the site visit so that pictures or videotapes can be taken of the meeting room area and retained for the files. The planner should remember to update the facility checklist, pictures, and videotapes whenever major renovations or staff changes are made at the facility. Additionally, obtaining a facility portfolio which includes menus, floor plans, description of services, maps and directions is necessary. This information is very useful throughout the planning process. Facility portfolios frequently change and the planner should ensure that the most recent portfolio is being used. Sales and catering representatives can provide the planner with the up-to-date portfolio information.

### **3. Sales Calls**

Sales representatives will often make sales calls to the judicial education organization and ask to meet with the planner. Usually, sales representatives bring facility portfolios with them and the planner can make an initial assessment regarding the viability of the facility based on the contents of the portfolio and the answers provided by the sales representative. The planner can also use the facility selection and facility survey checklists to guide any discussions with the sales representatives.

### **Third Task: Facility Selection**

Once a facility is selected and the program needs have been communicated, a contract must be finalized to guarantee that both the judicial education organization and the facility are protected. Whether the planner signs the facility contract or the facility representative signs the judicial education organization contract, the planner must ensure that the program needs are met, that the judicial education organization is protected, and that the contract is legally sound and valid.

Prior to signing a facility contract the planner must ensure:

- Meeting dates are accurate.
- Correct number of lodging rooms are reserved and for the accurate dates with stipulations on whether the lodging rooms are paid by individual participants or faculty members or placed on a master bill.
- Agreed upon meeting rooms and group meal rooms are reserved.
- Cancellation clauses are present.
- Liabilities are clearly articulated.
- Cost of lodging rooms, meeting rooms, meal rooms, and audiovisual equipment are cited.
- Gratuity rates and taxes are identified and fixed.
- Conditions or events that would trigger price increases, additional fees, etc. must be clearly articulated.
- Division of responsibilities for ADA compliance between facility and judicial education organization must be clearly articulated.

## **Fourth Task: Facility Management**

Facility management begins the day the planner selects the facility, but the active management begins usually 30 to 60 days prior to the program when the room arrangement information is sent to the facility.

Depending on the facility, the room arrangement information and accessibility requirements under the ADA are sent to the sales or catering representative or an account manager who is responsible for ensuring that all facility departments work together to meet the planner's needs. The room arrangement information should identify when the planner wants the rooms arranged and the beverage and food service delivered. Normally, several phone conversations will take place to clarify the needs, make adjustments, and so on. The clearer and more precise the instructions by the planner, the fewer pre-program phone calls will be necessary.

Normally, one of the last calls the planner will make prior to the program is the final meal count, which is usually required by the facility twenty-four, forty-eight, or seventy-two hours before the event. The meal and beverage selections have already been indicated on the room arrangement information previously submitted. The final meal count confirms the minimum number of meals the planner needs and will pay for. Facility logistical set-up information forms and the accompanying accessibility requirements under the ADA are on pages 90 through 95.

## **Fifth Task: On-Site Coordination**

Successful on-site coordination is the result of the planner and the facility staff working together prior to, during, and after the program. On-site coordination usually begins with a meeting prior to the program and includes the planner and managers from all of the facility departments who will be involved in serving the planner's group during the program. This meeting usually takes place the day before the event.

During the meeting, every aspect of the program is reviewed: lodging reservations, front desk services, announcement boards, program registration, beverage service, food service, meeting room set-up, meal set-up, visual services, security, accounting, concierge service, bell service, and facility lounge and restaurant services. This meeting provides the final opportunity for the planner to ensure that all facility departments are equally informed and are coordinating their services to meet the specifications set forth by the planner. Prior to leaving the meeting, the planner should obtain all of the facility phone extensions in order to reach the various departments during the program.

The day of the program, the planner usually arrives at the meeting rooms and registration area two hours before registration begins. At this time, the planner

checks on the accuracy of the set-up and starts placing all registration materials out so that registration can begin. If additional judicial education staff are working the event, they should be distributing all teaching aids and materials to the meeting rooms in preparation for the arrival of the participants and faculty. All audiovisual equipment should be set up, tested, and ready for use.

Food and beverage service, though pre-scheduled, should be personally checked by the planner to ensure on-time delivery. Any lapse in service can be detected early and corrected before it interferes with other scheduled activities.

Facility staff are key to successful on-site coordination; therefore, offering gratuities beyond what is written in the facility contract is recommended. The program planner should provide cash gratuities at the time of service. If that is not possible, the planner should get the names of the facility staff, put the gratuities in separate envelopes for each staff member, and leave the envelopes with the respective department managers or the account manager for distribution.

The program planner may want to acknowledge outstanding service by the account manager or department managers. Such acknowledgement should be offered by way of a gift, but not a gratuity.

Sometimes offering gratuities or gifts may be problematic for program planners if the judicial education organization will not reimburse the planner for those out-of-pocket expenses. Often, the facility will establish a gratuity/service account, whereby the facility bills the master account of the judicial education organization for gratuities authorized by the program planner at the time of service.

Before gratuities or gifts are given, the program planner must determine what the organizational policy is on this matter. If such practices are not approved, appreciation letters become even more important as the only way to recognize excellent service.

## **Sixth Task: After the Program**

The last step in facility management is reconciling the bill and sending letters of appreciation to the facility manager and staff who worked with the planner.

### **1. Reconciling the Bill**

Usually the planner reviews and approves all meeting room, audio-visual, and food service charges at the time they are provided. The same is true of any direct-bill lodging costs. The facility provides a statement of the lodging costs prior to the planner leaving the facility. When the bill arrives, it must be checked against the contract (as well as

all subsequent written instructions) and the bills approved by the planner while on-site. Any discrepancies should be reported to the planner's account manager or accounting representative. Payment should not be made until the planner is satisfied with the billed amounts.

## **2. Appreciation Letters**

Letters of appreciation should be sent to department managers and staff who provided services which were exemplary. Copies of the appreciation letters should be provided to the facility manager. Appreciation letters not only acknowledge a job well done but they also ensure that future events held at the facility will receive the same kind of attention previously enjoyed by the planner, participants, and faculty.

★ <b>Forms for Facility Selection and Management*</b> ★	
<b>Form Name</b>	<b>Page Number</b>
Facility Selection Checklist	78
Facility Survey Checklist	81
Facility Logistical Set-Up Information: Program Registration	90
Facility Logistical Set-Up Information: Education Sessions	91
Facility Logistical Set-Up Information: Food Service	92
Facility Logistical Set-Up Information: Breaks	93
Accessibility Requirements Under the ADA: List For On-Site Education and Training Programs	94

\*All forms are samples to be adapted as needed to fit the judicial education organization.



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**Facility Selection Checklist**

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**Instructions to Program Planner:** The needs of the program and characteristics of the participant group should be considered before final facility selection is made. Use this form to identify both when considering facility options.

**1. Geographic consideration:**

- ☐ Is this facility on a main highway which can be easily reached by the majority of the participants?
- ☐ Is this facility close to an airport?
- ☐ Is there available ground transportation (to/from/where)?
- ☐ Is this facility close to a train station?
- ☐ Is this facility located in a region where the majority of the participants who will attend this program are located?
- ☐ Is this facility centrally located in the state?  
Is this facility in
  - ☐ an urban area?
  - ☐ a suburban area?
  - ☐ a rural area?

**2. Accessibility requirements under the ADA:**

- ☐ Is this facility accessible under the ADA?
- ☐ Does the facility have accessible and adequate parking space?
- ☐ Does the facility have an accessible entrance?
- ☐ If more than one floor, is there an accessible elevator?
- ☐ Does the facility have accessible sleeping rooms and restrooms?
- ☐ Does the facility have a Telecommunications Device for the Deaf (TDD)?

### 3. Audience considerations:

Is this a

- ☐ judge audience?
- ☐ administration/management/supervisory audience?
- ☐ professional audience?
- ☐ technical audience?
- ☐ support staff audience?
- ☐ mixed audience? List audiences \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Average participant age

\_\_\_\_\_ percentage over 50 years of age (indicate percentage)  
 \_\_\_\_\_ percentage over 60 years of age (indicate percentage)

Is this audience physically active?

- ☐ play golf
- ☐ swim
- ☐ run/jog/walk
- ☐ use fitness equipment

Does this audience want a variety of dining opportunities?

- ☐ yes
- ☐ no

Does this audience enjoy

- ☐ sporting events?
- ☐ cultural events?
- ☐ natural or environmentally appealing surroundings?
- ☐ socializing with alcohol?
- ☐ socializing without alcohol?
- ☐ dancing?

Is this audience primarily

- ☐ a meat eating audience?
- ☐ a non-meat eating audience?
- ☐ mixed?
- ☐ has special dietary needs?
- ☐ does not care as long as food is good and in adequate quantities?

Will this audience bring

- ☐ adult guests, such as spouses?
- ☐ young guests, such as children or grandchildren?

**4. Type of program:**

- ☐ Annual or semi-annual conference
- ☐ Regional seminar
- ☐ Statewide seminar
- ☐ National seminar
- ☐ Limited enrollment seminar/workshop

This program will need

- |   | Number |
|---|--------|
| <input type="checkbox"/> a plenary session (size) | _____  |
| <input type="checkbox"/> break-out rooms (size)   | _____  |
| <input type="checkbox"/> a lunch room             | _____  |
| <input type="checkbox"/> staff/faculty work room  | _____  |
| <input type="checkbox"/> registration area        | _____  |
| <input type="checkbox"/> break-out areas          | _____  |
| <input type="checkbox"/> suites                   | _____  |

**5. Expected number of participants:**

**6. Other considerations for facility selection:**

---



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## Facility Survey Checklist



**Instructions to Program Planner:** Use this checklist when conducting a site visit.

Planner:	_____		
Facility:	_____		
Location:	_____	Fax:	_____
Sales Manager:	_____	Phone:	_____
Catering Manager:	_____	Phone:	_____
Purpose of Meeting:	_____		
Expected Attendance:	_____	Audience:	_____

**1. When meeting with facility staff prior to a tour, get the following information:**

A. ☐ Availability of dates

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

B. ☐ Renovation/construction plans

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

C. ☐ Medical/emergency services  
 (ask about personnel, hospitals, etc.)

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

- D. ☐ Security services  
(ask about personnel, security measures, where/how additional security can be obtained)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- E. ☐ Establishment of master accounts  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- F. ☐ Establishment of direct billing  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- G. ☐ Tax rate  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- H. ☐ Late fees/charges  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- I. ☐ Gratuity rate  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- J. ☐ Documentation to establish account and tax status  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

K. ☐ Deposit policy  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

L. ☐ Parking fee  
 \_\_\_\_\_

M. ☐ Valet service  
 \_\_\_\_\_

N. ☐ Restaurants  
☐ Variety  
☐ Hours of operation  
☐ Cost  
☐ Facility provides restaurant information in surrounding vicinity

O. ☐ Amenities  
☐ Pool  
☐ Health club  
☐ Whirlpool  
☐ Sauna/Steamroom  
☐ Golf  
☐ Track  
☐ Walking paths  
☐ Tennis

P. ☐ Loading/unloading area and equipment  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

- Q. ☐ Storage
- \_\_\_\_\_
- \_\_\_\_\_
- R. ☐ Number of sleeping rooms
- ☐ Single rate \_\_\_\_\_
- ☐ Double rate \_\_\_\_\_
- ☐ Suite rate \_\_\_\_\_
- ☐ Tax \_\_\_\_\_
- ☐ Accommodations for persons with disabilities \_\_\_\_\_
- ☐ Non-smoking rooms \_\_\_\_\_
- ☐ Complimentary rooms \_\_\_\_\_
- ☐ Early check-in costs \_\_\_\_\_
- ☐ Cost of guaranteeing late check-in \_\_\_\_\_
- ☐ Late check-out costs \_\_\_\_\_
- S. ☐ Meeting rooms
- ☐ Number of general session rooms \_\_\_\_\_
- ☐ Number of break-out rooms \_\_\_\_\_
- ☐ Dimensions \_\_\_\_\_
- ☐ Location \_\_\_\_\_
- ☐ Physical obstructions \_\_\_\_\_
- ☐ Degree of soundproofing \_\_\_\_\_
- ☐ Individualized temperature control \_\_\_\_\_
- ☐ Electrical outlets \_\_\_\_\_
- ☐ Public address system \_\_\_\_\_
- ☐ Set-up time \_\_\_\_\_

- ☐ Identify other groups or events  
scheduled in the facility \_\_\_\_\_
- ☐ Restrooms nearby \_\_\_\_\_
- ☐ Registration area \_\_\_\_\_
- ☐ Coffee break area \_\_\_\_\_
  
- T. ☐ Facility information services
  - ☐ Reader boards \_\_\_\_\_
  - ☐ Marquee \_\_\_\_\_
  
- U. ☐ Audiovisual services
  - ☐ Equipment \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  - ☐ Staff \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  
- V. ☐ Facility accessibility under the ADA
  - ☐ Accessible parking spaces
  - ☐ Ramps, lifts
  - ☐ Elevators
  - ☐ Sleeping rooms, including bathrooms,  
accommodate persons who use wheelchairs
  - ☐ Accessible public restrooms
  - ☐ Doorway and corridor width sufficient for wheelchairs
  - ☐ Floor surfaces smooth and firm
  - ☐ Lowered public telephones

- ☐ TDD
- ☐ Readable signs with large lettering; braille or raised symbols
- ☐ Sufficient lighting in rooms and corridors
- ☐ Emergency warnings in multiple delivery methods

W. ☐

Food service

- ☐ Group breakfast (options and prices) \_\_\_\_\_  
\_\_\_\_\_
- ☐ Group lunch (options and prices) \_\_\_\_\_  
\_\_\_\_\_
- ☐ Group dinner (options and prices) \_\_\_\_\_  
\_\_\_\_\_
- ☐ Group breaks (options and prices) \_\_\_\_\_  
\_\_\_\_\_
- ☐ Social hour (options and prices) \_\_\_\_\_  
\_\_\_\_\_
- ☐ Ability to accommodate special dietary requests \_\_\_\_\_  
\_\_\_\_\_

X. ☐

Lodging reservations

- ☐ Reservation cards \_\_\_\_\_
- ☐ Phone-in reservations \_\_\_\_\_
- ☐ Lodging list prepared by judicial  
education organization \_\_\_\_\_
- ☐ Release date for room block \_\_\_\_\_

2. When taking a facility tour, look for the following items:

A. ☐

Lobby area

☐ Cleanliness

☐ Reader board visibility

☐ Bellperson/concierge

☐ Condition of furnishings/floors

☐ Congested areas

☐

Comments/problems

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

B. ☐

Sleeping rooms

☐ Cleanliness of bathroom/shower

☐ Condition of furnishings/rugs/drapes

☐ TV/radio/movie channel

☐ Refrigerator/wet bar

☐ Locks

☐ View

☐ Sprinkler/fire alarm/instructions/exits

☐ Accommodations for persons with disabilities

☐ TDD in room

☐ TDD adopted for captioning in room

☐ Size of room

☐

Comments/problems

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

C.

☐

## Meeting rooms

- ☐ Cleanliness
- ☐ Acoustics
- ☐ Outlets
- ☐ Ventilation/temperature control
- ☐ Barriers (columns, obstructions)
- ☐ Room arrangement
- ☐ Near kitchen
- ☐ Near pool
- ☐ Easy access to loading/unloading
- ☐ Easy access to storage area
- ☐ Easy access to registration area
- ☐ Accommodate large pieces of equipment
- ☐ Accommodate large group
- ☐ Rooms break into smaller rooms
- ☐ Easy access for persons with disabilities
- ☐ Emergency exits
- ☐ Well maintained audiovisual equipment
- ☐ Public address system
- ☐ Lighting adequacy
- ☐ Lighting flexibility

☐

Comments/problems

---

---

D.

☐

Staff

- ☐ Polite and courteous
- ☐ Introduce themselves
- ☐ Helpful
- ☐ Efficient
- ☐ Professional appearance
- ☐ Service staff location

☐

Comments/problems

---



---

E.

☐

Premises

- ☐ Landscape well maintained
- ☐ Cleanliness of pool/spa
- ☐ Shower area
- ☐ Everything in working condition
- ☐ Policy/rules visible
- ☐ Adequate parking
- ☐ Secure parking
- ☐ Maintained golf course
- ☐ Maintained track
- ☐ Maintained tennis courts
- ☐ Maintained walking paths
- ☐ Outside noise level

★

### Facility Logistical Set-Up Information: Program Registration



**Instructions to Program Planner:** Complete this form and send it to the hotel.

Program Name: \_\_\_\_\_

Program Dates: \_\_\_\_\_

Function: \_\_\_\_\_

Registration Time: \_\_\_\_\_

Registration Date(s): \_\_\_\_\_

Time Set-Up Required: \_\_\_\_\_

Room or Area Name: \_\_\_\_\_

Equipment Needed: \_\_\_\_\_

Number of Staff: \_\_\_\_\_

Specific ADA Requirements (check one):

Yes, see attached list \_\_\_\_\_

No \_\_\_\_\_

Registration Set-Up Diagram:

Front
Back



**Facility Logistical Set-Up Information: Education Sessions**



**Instructions to Program Planner:** Complete this form for each education session and send it to the hotel.

Program Name:	_____
Program Dates:	_____
Session Title:	_____
Session Date:	_____
Time Set-Up Required:	_____
Room or Area Name:	_____
Audiovisual Equipment:	_____
Participant Number:	_____
Faculty Number:	_____
Specific ADA Requirements (check one):	<input type="checkbox"/> Yes, see attached list <input type="checkbox"/> No

Education Session Set-Up Diagram:

Front
Back

**Facility Logistical Set-Up Information: Food Service**

**Instructions to Program Planner:** Complete this form for each food service event and send it to the hotel.

Program Name:	_____
Program Dates:	_____
Food Function:	_____
Food Function Time:	_____
Food Function Date:	_____
Time Set-Up Required:	_____
Room Name:	_____
Audiovisual Equipment:	_____
Number To Be Served:	_____
Food Selection:	_____
Specific ADA Requirements (check one):	<div style="display: flex; justify-content: space-around;"> <div> <input type="checkbox"/> Yes, see attached list         </div> <div> <input type="checkbox"/> No         </div> </div>

Food Function Set-Up Diagram:

Front
Back



## Facility Logistical Set-Up Information: Breaks



**Instructions to Program Planner:** Complete this form for each break and send it to the hotel.

Program Name:	_____
Program Dates:	_____
Break:	_____
Break Time:	_____
Break Set-Up Time:	_____
Break Set-Up Date:	_____
Break Room or Area Name:	_____
Number to be Served:	_____
Beverage & Food Selection:	_____
Specific ADA Requirements (check one):	<input type="checkbox"/> Yes, see attached list <input type="checkbox"/> No

**Break Set-Up Diagram:**

Front
Back



### **Accessibility Requirements Under the ADA List For On-Site Education and Training Programs**



**Instructions to Facility Representative:** The program planner has checked those ADA requirements necessary for this program. Please ensure that the requirements are met.

**1. Accessible physical size and approach:**

- ☐ Clear floor or ground space for one stationary wheelchair and occupant: 30 inches by 48 inches

**2. Accessible registration and break tables:**

- ☐ Forward reach if clear floor space allows for forward approach only: maximum height 48 inches, minimum height 15 inches
- ☐ Side reach if clear floor space allows for parallel approach only: maximum height 54 inches, minimum height 9 inches

**3. Reserved signs:**

- ☐ At front of room for hearing impaired
- ☐ On aisles or near exits for mobility impaired

**4. Table space:**

- ☐ Allow per person: height 27 inches, width 30 inches and depth 19 inches; optimum space is 28 inches by 34 inches by 19 inches
- ☐ Aisles between tables 3 feet wide

**5. Audible speakers:**

- ☐ Use microphones for: large audience, ceiling heights exceeding 10 feet, and soft-spoken presenters

**6. Accessible riser:**

- ☐ Ramps with maximum rise of 1 inch per 1 foot distance
- ☐ Ramp with level landings at bottom and top
- ☐ Steps to riser are steady and secure, of equal size, and no less than 11 inch tread

**7. Technology:**

- ☐ Sound enhancement system
- ☐ Equipment for real time translation (i.e. computer monitor, screen)



## Chapter 5: Program Announcements and Confirmation Notices

Program announcements and confirmation notices are important for several reasons:

- First, the program announcement notifies the target audience that a program has been specifically designed for them. They will read the announcement and determine if their needs and interests are being addressed by the judicial education organization.
- Second, the target audience will gauge the judicial education organization's commitment to quality education and training by the professional appearance of the announcement and by the level of detail and description offered.
- Third, the target audience will determine if their interest and enthusiasm matches that which is conveyed in the announcement and decide if they want to attend.
- Fourth, and very importantly, the program announcement must not only market the program to the target audience, but it must also market it to those individuals who approve the participant's attendance or the expenditure of funds related to program attendance.

Confirmation notices are equally important, but for different reasons:

- First, confirmation notices act as a contract between the judicial education organization and the participant. The confirmation notice commits the judicial education organization to present the program; and, it commits the participant to the goals, objectives, and activities of the program as they relate to the participant's learning.
- Second, the confirmation notice announces acceptance of the participant into the program and holds the participant responsible for attending, interacting, and learning throughout the seminar.
- Third, the confirmation notice alerts administrators and budget personnel that the participant will be attending the program; returning with new knowledge, information, skills, and ways of thinking that can be applied in the workplace; and that the participant may be returning with a list of reimbursable expenses.

- Fourth, confirmation notices provide all important logistical information which will help to ensure that the participant can locate where the program is being held and be there on time. Such logistical information can also be left with others who may need to locate the participant during the program if the need arises.

### **First Task: Write and Send Program Announcements**

Program announcements are usually the first detailed information that potential program participants receive about a program for which they can register. Announcements can be in many forms such as brochures, fliers, leaflets, or an announcement portfolio. Regardless of the form, a program announcement provides:

1. Name, date, and location of the program
2. Beginning and ending times of the program
3. Target audience description
4. Program description with topical listings
5. Goals and objectives of the program
6. Required participant learning activities and exercises
7. Faculty names and brief descriptions of credentials
8. Lodging, meals, and travel information
9. Cost information (if appropriate)
10. Mandatory education credits and information (if appropriate)
11. Registration information:
  - How to register
  - Who to register with
  - Deadlines
  - Payment options (if appropriate)

The program announcement is also the place where potential participants are notified that the program will accommodate persons with disabilities in compliance with the ADA. Specifically, the announcement should indicate that the facility is wheelchair accessible. The announcement should have a statement of accessibility relating to program attendance such as:

"This location is accessible to persons with disabilities. In addition, reasonable accommodations for program participation, including sign language interpreters, auxiliary aids or materials in alternative formats will be provided upon request, with seven days notice. Contact {name of contact person} at {phone number}."

The planner may wish to make the accommodation options available within the announcement so that the person requesting the services may do so on the program registration form. For participants with visual impairments, the planner could offer the materials in large print or audiotape. For participants with hearing impairments, the planner could offer written materials, signers, interpreters, and video captions. For those with mobility impairments, the planner can offer specific accessibility options for attendance.

The conference announcement not only informs, it entices and encourages potential participants to register and attend. Therefore, the announcement should be aesthetically appealing, easily read, and should convey that the subject matter is more than *nice to know*; instead it is *need to know*. Of equal importance is that the announcement should contain all essential registration information so that registration is uncomplicated. In short, the program announcement is a marketing tool and should be designed from a "user's perspective." So, the planner must know the participant group's characteristics and use that knowledge in developing the announcement. A program announcement checklist is on page 101.

## **Second Task: Write and Send Confirmation Notices**

Confirmation notices confirm the participants registration for the program and for individual sessions, where appropriate. If the planner makes participant lodging reservations, a confirmation of lodging should also be included.

Confirmation notices usually are accompanied by attachments which include hotel brochures that contain all necessary phone numbers, maps and directions, any required pre-program assignments, program schedule or agenda, and a program participant list. A confirmation notice checklist is on page 103.

Confirmation notices also provide cancellation instructions, which participants use if necessary. If the participant does not cancel, the confirmation notice is usually the last contact the planner has with the participant prior to the program.

★ Forms for Program Announcements and Confirmation* ★	
Form Name	Page Number
Program Announcement Checklist	101
Confirmation Notice Checklist	103

\*All forms are samples to be adapted as needed to fit the judicial education organization.

**Program Announcement Checklist**

**Instructions to Program Planner:** Use this checklist when writing the program announcement to ensure that the announcement conveys all necessary information; as well as communicating the intent and spirit of the program.

- \_\_\_\_\_ 1. Does the program name accurately characterize the program?
- \_\_\_\_\_ 2. Will the name be appealing to the target audience?
- \_\_\_\_\_ 3. Is the name prominently located on the announcement?
- \_\_\_\_\_ 4. Is the program date prominently located on the announcement?
- \_\_\_\_\_ 5. Is the program location prominently displayed on the announcement?
- \_\_\_\_\_ 6. Is the sponsoring organization prominently displayed on the announcement?
- \_\_\_\_\_ 7. Are beginning and ending times of the program identified?
- \_\_\_\_\_ 8. Is the target audience identified?
- \_\_\_\_\_ 9. Are all participation requirements described?
- \_\_\_\_\_ 10. Is the goal or purpose of the program stated?
- \_\_\_\_\_ 11. Are the objectives listed?
- \_\_\_\_\_ 12. Are the topics listed?
- \_\_\_\_\_ 13. Are the topics described?
- \_\_\_\_\_ 14. Is the program format described?
- \_\_\_\_\_ 15. Are the faculty members listed?
- \_\_\_\_\_ 16. Is all pertinent information about the faculty members offered?
- \_\_\_\_\_ 17. Is all lodging reservation information provided?
- \_\_\_\_\_ 18. Is food service information provided including ability to accommodate special dietary needs?

- \_\_\_\_\_ 19. Is travel information to and from the facility provided?
- \_\_\_\_\_ 20. Are all program costs listed?
- \_\_\_\_\_ 21. Is mandatory (or optional) continuing education credit information provided?
- \_\_\_\_\_ 22. Are instructions listed on how to register for the program?
- \_\_\_\_\_ 23. Are instructions available on when to register for the program?
- \_\_\_\_\_ 24. Is the description on eligible audience clear?
- \_\_\_\_\_ 25. Are payment options explained?
- \_\_\_\_\_ 26. Is the program registration deadline prominently displayed?
- \_\_\_\_\_ 27. Are instructions on how to cancel explained?
- \_\_\_\_\_ 28. Is an ADA statement included?
- \_\_\_\_\_ 29. Are the options for persons with disabilities provided?



### Confirmation Notice Checklist



**Instructions to Program Planner:** Use this checklist when writing the confirmation notice to ensure that participants will have all the information they need to attend this program.

- \_\_\_\_\_ 1. Confirmation of program attendance
- \_\_\_\_\_ 2. Confirmation of session enrollment
- \_\_\_\_\_ 3. Confirmation of lodging reservations (if applicable)
- \_\_\_\_\_ 4. Facility phone numbers
- \_\_\_\_\_ 5. Facility address
- \_\_\_\_\_ 6. Facility map
- \_\_\_\_\_ 7. Directions to the facility
- \_\_\_\_\_ 8. Transportation information
- \_\_\_\_\_ 9. Parking information
- \_\_\_\_\_ 10. Cancellation information
- \_\_\_\_\_ 11. Program schedule
- \_\_\_\_\_ 12. Program agenda
- \_\_\_\_\_ 13. All pre-program assignments, with directions
- \_\_\_\_\_ 14. Description of facility amenities and services
- \_\_\_\_\_ 15. Confirmation of accommodations for ADA service recipients
- \_\_\_\_\_ 16. Confirmation of accommodations for special dietary needs



## Chapter 6: Budgets

The annual judicial education organization budget is based in part on expected expenditures for individual programs. Accurately projecting expenditures and establishing individual program budgets is critical to good overall management. Because many program decisions will be made based on funds, program budgets must be calculated and used in planning individual program and organization-wide budgets.

### First Task: Determine the Program Budget

Normally, the planner has a budget for every program based on revenue and cost estimates. The program's budget will indicate the total amount allocated from the judicial education organization and from other sources for the program. The planner makes program decisions which allocate the amount to be spent for each of the major areas:

- First, participant costs (if reimbursed) such as lodging, travel, and per diem costs are individually calculated and then totalled.
- Second, facility costs which include room rental, breaks, group meals, and audiovisual equipment are calculated for total facility costs.
- Third, faculty expenses such as honorarium or fees, travel, lodging, and per diem are figured.
- Fourth, staff costs associated with program travel are calculated.
- Fifth, costs for any pre and post program meetings are calculated which include facility costs, if held outside of the judicial education organization office, and all travel, lodging, and per diem expenses for the meeting attendees.
- Sixth, costs for announcements, confirmation notices, postage, written materials, notebooks/folders, tabs, teaching aids, equipment, and contractual support services are calculated.

The grand total of all five cost categories should be equal to or less than the allocated amount. A sample program budget form is on page 108.

## **Second Task: Utilize the Budget Work Sheets**

The working budget has three columns. The first column contains the budgeted amount for each expenditure category transferred to the work sheets from the program budget. The second column is the projected or known expenditures for each category (updated frequently based on the latest information). The third category is the difference between the budgeted amount and the actual or projected expenditures for each category.

Frequent review of the third column permits the planner to monitor individual and overall expenditures against budget targets. This information is not only important for current programming, but it helps the planner project more accurate budgets in the future if the discrepancies are significant for either the program budgets or the judicial education organization budget. A sample budget work sheet is on page 110.

★ Forms for Program Budget* ★	
Form Name	Page Number
Program Budget	108
Budget Work Sheets	110

\*All forms are samples to be adapted as needed to fit the judicial education organization.

**Program Budget**

**Instructions to Program Planner:** Complete a budget for each program. Use your budget information when making cost decisions about programming.

Program: _____	
Location: _____	
Date: _____	FY: _____
Projected Number of Participants: _____	
Projected Number of Faculty: _____	
Projected Number of Staff: _____	
Allocated Amount: \$ _____	Revenue: \$ _____
Total Available: \$ _____	Budget I.D. #: _____

**1. Participant costs:**

A. Travel	\$	_____
B. Lodging	\$	_____
C. Per diem	\$	_____
D. Miscellaneous	\$	_____

\$ \_\_\_\_\_  
(Total)

**2. Facility costs**

a. Room rental	\$	_____
b. Breaks	\$	_____
c. Meals	\$	_____
d. Audiovisual equipment	\$	_____
e. Miscellaneous	\$	_____

\$ \_\_\_\_\_  
(Total)

**3. Faculty costs**

a. Honorarium/fees	\$	_____
b. Travel	\$	_____
c. Lodging	\$	_____
d. Per diem	\$	_____
e. Miscellaneous	\$	_____

\$ \_\_\_\_\_  
(Total)

4. **Staff costs**

a. Travel	\$ _____	
b. Lodging	\$ _____	
c. Per diem	\$ _____	
d. Miscellaneous	\$ _____	
		\$ _____ (Total)

5. **Planning/evaluation meetings costs**

a. Travel	\$ _____	
b. Lodging	\$ _____	
c. Per diem	\$ _____	
d. Facility (room rental/audiovisual/breaks/meals)	\$ _____	
e. Miscellaneous	\$ _____	
		\$ _____ (Total)

6. **Material costs**

a. Announcements/confirmation notices	\$ _____	
b. Postage	\$ _____	
c. Written materials (paper and duplication)	\$ _____	
d. Notebooks/folders	\$ _____	
e. Tabs	\$ _____	
f. Teaching aids (transparencies, videotapes, slides, audiotapes, instruments, articles)	\$ _____	
g. Contractual support services	\$ _____	
h. Miscellaneous	\$ _____	
		\$ _____ (Total)

<b>Total funds required</b>	\$ _____
-----------------------------	----------

<b>Total funds available</b>	\$ _____
------------------------------	----------

<b>Balance</b>	\$ _____
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\_\_\_\_\_  
(Submitted by)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Approved by)

\_\_\_\_\_  
(Date)



## Budget Work Sheets



**Instructions to Program Planner:** This form is used as a way to keep current with program expenses. By using this form, you can closely monitor and make adjustments to expenditures and budget amounts.

Program: _____ Location: _____  Date: _____ Total Funds Available: _____ Budget I.D. #: _____			
Budget Categories	Budgeted Amount	Projected/ Known Amount	Difference (indicate over budget amounts by placing amount in parenthesis)
<b>1. Participants</b>			
A. Per diem: amount per person \$ _____ x total # of participants _____			
B. Travel: amount per person \$ _____ x total # of participants _____			
C. Lodging: amount per person \$ _____ x total # of participants _____			
<b>2. Facility</b>			
A. Room Rental (calculate based on # of rooms x rental cost)			
B. Breaks (calculate based on # of breaks x amount of each break x # of participants)  <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div># of breaks</div> </div> <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div>cost of breaks</div> </div> <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div># of participants</div> </div>			
C. Meals (calculate based on # of meals x amount of meals)  <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div># of meals</div> </div> <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div>amount of meals</div> </div>			

Budget Categories	Budgeted Amount	Projected/ Known Amount	Difference (indicate over budget amounts by placing amount in parenthesis)
<b>D. Audiovisual Equipment</b> (calculate based on equipment and cost per piece)  <div> <div>_____ Equipment</div> <div>\$ _____ Cost</div> <div>_____ Equipment</div> <div>\$ _____ Cost</div> <div>_____ Equipment</div> <div>\$ _____ Cost</div> <div>_____ Equipment</div> <div>\$ _____ Cost</div> </div>			
<b>3. Faculty</b>			
<b>A. Per Diem:</b> amount per person \$ _____ x total # of faculty _____			
<b>B. Travel:</b> amount per person \$ _____ x total # of faculty _____			
<b>C. Lodging:</b> amount per person \$ _____ x total # of faculty _____			
<b>D. Honorarium/Fees</b> (amount per person)  <div> <div>\$ _____</div> <div>\$ _____</div> <div>\$ _____</div> <div>\$ _____</div> <div>\$ _____</div> <div>\$ _____</div> </div>			
<b>4. Staff</b>			
<b>A. Per Diem:</b> amount per person \$ _____ x total # of staff _____			
<b>B. Travel:</b> amount per person \$ _____ x total # of staff _____			
<b>C. Lodging:</b> amount per person \$ _____ x total # of staff _____			
<b>D. Contractual Support Services</b>  <div> <div>_____ Type</div> <div>\$ _____ Cost</div> <div>_____ Type</div> <div>\$ _____ Cost</div> <div>_____ Type</div> <div>\$ _____ Cost</div> <div>_____ Type</div> <div>\$ _____ Cost</div> </div>			
<b>5. Planning/Evaluation Meetings</b>			
<b>A. Attendee Travel:</b> amount per person: \$ _____ x # of meetings			

Budget Categories	Budgeted Amount	Projected/ Known Amount	Difference (indicate over budget amounts by placing amount in parenthesis)
B. Lodging: amount per person: \$ _____ x # of meetings			
C. Per Diem: amount per person: \$ _____ x # of meetings			
D. Facility Room Rental			
E. Breaks (calculate based on # of breaks x amount of each break x # of participants) <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div># of breaks</div> </div> <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div>cost of breaks</div> </div> <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div># of participants</div> </div>			
F. Meals (calculate based on # of meals x amount of meals) <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div># of meals</div> </div> <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div>amount of meals</div> </div>			
G. Audiovisual Equipment (calculate based on equipment and cost per piece) <div style="display: flex; justify-content: space-between;"> <div>_____ Equipment</div> <div>\$ _____ Cost</div> </div> <div style="display: flex; justify-content: space-between;"> <div>_____ Equipment</div> <div>\$ _____ Cost</div> </div> <div style="display: flex; justify-content: space-between;"> <div>_____ Equipment</div> <div>\$ _____ Cost</div> </div> <div style="display: flex; justify-content: space-between;"> <div>_____ Equipment</div> <div>\$ _____ Cost</div> </div>			
<b>6. Material Costs</b>			
A. Announcements (calculate cost per announcement x # of announcements) <div style="display: flex; justify-content: space-between;"> <div>\$ _____</div> <div>cost per announcement</div> </div> <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div># of announcements</div> </div>			
B. Postage (calculate amount of postage x # of mailings) <div style="display: flex; justify-content: space-between;"> <div>_____ Mailings</div> <div>\$ _____ Cost</div> </div> <div style="display: flex; justify-content: space-between;"> <div>_____ Mailings</div> <div>\$ _____ Cost</div> </div> <div style="display: flex; justify-content: space-between;"> <div>_____ Mailings</div> <div>\$ _____ Cost</div> </div> <div style="display: flex; justify-content: space-between;"> <div>_____ Mailings</div> <div>\$ _____ Cost</div> </div>			
C. Paper (calculate cost per sheet x # of sheets x number of people) <div style="display: flex; justify-content: space-between;"> <div>\$ _____</div> <div>cost per sheet</div> </div> <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div># of sheets</div> </div> <div style="display: flex; justify-content: space-between;"> <div>_____</div> <div># of people</div> </div>			

Budget Categories	Budgeted Amount	Projected/ Known Amount	Difference (indicate over budget amounts by placing amount in parenthesis)
<p>D. Duplication (calculate cost per image x # of images)</p> <p>\$ _____ cost per image _____ # of images</p>			
<p>E. Notebooks/Folders (calculate cost per notebook/folder x # of notebooks/folders)</p> <p>\$ _____ cost per notebook/folder _____ # of notebooks/folders</p>			
<p>F. Tabs (calculate cost per tab x # of tabs)</p> <p>\$ _____ cost per tab _____ # of tabs</p>			
<p>G. Teaching Aids (transparencies, slides, videotapes, audiotapes, instruments, articles)</p> <p>_____ Teaching Aid \$ _____ Cost                      _____ Teaching Aid \$ _____ Cost                      _____ Teaching Aid \$ _____ Cost                      _____ Teaching Aid \$ _____ Cost</p>			



## Chapter 7: Conclusion

This monograph is offered as a tool for program planners who are faced with the responsibility of managing several training and education programs which may be at varying stages of completion.

*Program Management: Managing Deadlines, Details, Activities, and People* can be used by itself when the planner's main responsibility is handling logistical-type arrangements. However, if the planner is responsible for curriculum development and planning as well, using *Curriculum, Program, and Faculty Development: Managing People, Process, and Product: JERITT Monograph Four* (Waldrop and Conner, 1994) along with this monograph will provide the planner with a process, information, and tools to manage *all* aspects of designing and delivering education and training programs.

