Manual for Learning Networks and Sessions

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Foreword by Minister Geraldine Fraser-Moleketi

Major challenges continue to face the public service because service delivery is dynamic and continuous. As government we have, however, made a lot of progress in improving the lives of citizens and there are many pockets of success and excellence in the public service that bear testimony to that. We therefore need to put in place appropriate mechanisms in our respective organisations to showcase these successes and create platforms to share and exchange knowledge. This is in fulfillment of our quest to become a public service that learns from its experiences and lessons - good and bad.

This booklet provides guidance and tips on how to set up and run learning networks and other learning fora, that is, what efforts and resources are required in order to plan for a successful learning programme in the public service.

As public servants we must seize the opportunity that government has presented to empower ourselves with skills and knowledge to perform competitively to improve service delivery. Let us make optimal use of this booklet to successfully organise ourselves into an active learning community that takes its pride in its sucesses and at the same time learns from its mistakes.

Geraldine Fraser-Moleketi
Minister for Public Service and Administration

PART 1

LEARNING NETWORKS IN THE PUBLIC SERVICE

INTRODUCTION

BACKGROUND: the case for learning in the public service

Transforming the public service for enhanced and modernised service delivery is imperative. Progress is limited because of immense backlogs, lack of capacity to interpret policies for implementation and capacity to implement. What exacerbates the problems is the reported lack of knowledge and information on addressing the challenges and implementing in line with Batho Pele principles that require that services be rendered in different ways. This is a major disabling factor since in this knowledge economy knowledge is at the core of all the functions in government and is viewed as the raw material for what government does to meet its mandate. It is therefore imperative for this intellectual capital to be managed as a critical asset.

On the other hand, the claim that there is lack of knowledge is not entirely true some of the knowledge that is required is already in existence. Each province attempts to find solutions to its many challenges, institutes various projects, processes and systems to maximise its efforts. Some of these efforts yield results whilst others fail and in both perspectives valuable information/knowledge has been generated. To a large extent this knowledge is not documented appropriately, is not co-ordinated, thus remaining inaccessible. The unfortunate consequence is that this crucial information is not shared, resulting in the costly duplication of efforts as each province or department embarks on a solution- finding mission (re-inventing of the wheel). Therein lies the urgent need to institute a national learning programme as well as programmes in each province, for the purpose of sharing best practices, mistakes, experiences, methodologies, case studies, etc. A strong impetus for the sharing of information and knowledge is the reported commonality of problems and challenges that confront the various provinces albeit to differing degrees. For instance, the complexities around the social grants responsibility have been observed throughout the country.

Leading governmental organisations globally have discovered that cultivating learning networks or communities of practice is the keystone of an effective learning and knowledge strategy. The platform of Learning Networks is being utilized the world over for the purpose of sharing knowledge as well as generating new knowledge and for unleashing innovation. Various sectors, particularly the private and public sectors, have come to value this platform and are thus maximizing the use of learning networks.

Public servants have raised the problem of being inundated with reading materials and various thick and inaccessible documents against the backdrop of limited time frames. They have expressed the need for simple, easily accessible solutions and methodologies as opposed to highly conceptual documents. Importantly they have requested access to one another as colleagues who are facing similar challenges across the Country. They feel that a lot of knowledge is only a phone call away in another colleague, department or province. Learning networks are an ideal facility for public managers to network, engage on issues of common concern, share problems and frustrations and collaborately devise new methods and ideas for tackling them. The support of learning networks is thus a key strategic activity in the process of building an adaptive and learning public service and, along the lines of a learning organisation, enhancing organisational innovation.

1. DEFINING A LEARNING NETWORK & ITS PURPOSE

A learning network is a group of people who are engaged in similar or related activities and who share a common purpose related to their common context and similar work roles. This common purpose leads them to share frustrations, ideas, experiences, successes, lessons learnt and insights on specific themes and to help one another find solutions to problems and develop a common practice or approach to the field:

- Collaborative learning results in better understanding of and clarity on challenges and expected outcomes as well as better insight on how to achieve goals and make expected or maximum impact within their areas of performance and influence.

- By design, engagement amongst members results in the creation of new knowledge through reflection, debates, discussions, etc.

The public service is made up of a range of these learning networks in which learning is not a matter of conscious design or recognisable structures, but a process arising from 'common enterprise, experience and sociability learning in doing'. Learning networks are variously referred to as communities of practice, learning communities, thematic groups, peer groups, knowledge networks, etc. although they remain similar in general intent.

Of importance is the driving force behind the emergence of such networks, that is, **the drive to find solutions to problems in a cost effective way**, by learning from one another through, for instance, sharing of case studies.

The great benefit is in **linking champions** or **experts** in a specific field for the purpose of sharing tacit knowledge. This whole networking, in reality and potentially, results in saving of costs that could be incurred through reinventing methodologies which have already been developed with or without success. In the past unscrupulous consultants have reportedly exploited the system by selling one solution several times by simply repackaging it differently for different clients, be it provinces or departments. In some instances they have developed a methodology, revised it for another situation and then sold it at double the price.

Learning networks do not normally fall within the organisational structure of an organisation and are not bound or driven by any bureaucratic design. Members are informally bound together by shared expertise and passion for finding solutions jointly and sharing their knowledge. Membership and participation is voluntary although, in a public sector context, each province, department or component has to ensure participation in the network by nominating its own 'permanent' participants and drivers of learning (learning champions) in line with their needs and programme content. These 'permanent' members should be mandated and encouraged to co-opt relevant colleagues who are working within specific areas covered in specific sessions.

Format & frequency of engagements

How often learning events are organised under the auspices of learning networks will be influenced by the urgency to learn around a specific problem or challenge, content availability, etc. Engagement can take different formats, such as workshops, site visits, exchanges, etc.

Life-span of learning networks

An important and acceptable dynamic in the learning network scenario is that they emerge and dissolve, caused by the fact that they are genuinely driven by 'need'. Understandably it is not cost effective to run a network that is not serving a felt need by its members. Many become permanent features and forces whilst others merge once commonalities in membership, activities and content are manifest themselves.

2. FORMING A LEARNING NETWORK

The learning network evolves through mutual practice, agreement, discussion and experimentation by its members. Content owners, be it line departments or components within departments, have a crucial role to play. For instance, leading policy makers and practitioners within various fields such as human resources management, E-government, social development, health and public works, etc. are content owners. Project managers are important content owners and thus drivers of learning networks.

Forming a learning network can be divided into the following activities:

Determining the purpose

This stage involves the initial conceptualisation of the network by a group of colleagues or peers who recognise the need to collaborate on specific issues that relate to their performance. Practical examples would be finding solutions around the social grants responsibility and integrating services between various service providers. Content owners have a crucial role to play in identifying stakeholders and prioritising pressing learning areas or issues. The purpose will likely be modified or refined many times in the course of the evolution of the learning network.

Determining the membership

The purpose of the learning network will influence or define its membership. The group of departments or individuals who might have interest in the purpose or who could contribute to learning around the purpose will form part of the learning network. The various partners and clients in both public and private sectors have a great contribution to make. Membership is likely to be influenced at different times by the modification or refinement of the purpose as mentioned above. Depending on the focus of each session, attendance will oscillate from time to time.

In broad terms, there are two overlapping, types of learning networks:

- **Common Purpose Learning Networks:** These learning networks are often made up of individuals who have a common purpose in public organisations. This can be by virtue of specific projects or programmes that they need to engage in, or could be by virtue of common functional areas of work. This could, for example, include individuals or groups of departments responsible for managing large-scale delivery of infrastructure e.g. roads construction and maintenance, responsible for processing social grants, for procurement, logistics and other corporate services.

- **Common Expertise Learning Networks:** These are learning networks that are bound less by a common definition of their purpose in public organisations, but are bound more by a common base of expertise. These could, for example, be corporate, e-government, IT, HR managers in the public service, etc.

Nominating learning champions

Of extreme importance in establishing learning networks is the identification and nomination of people, learning champions, who will drive the network/s. These people will play a crucial role in ensuring that learning is embraced within and/or amongst the province or within and/or amongst departments who share a common purpose.

Nomination: Learning champions will be nominated by line departments that are leading in content areas, or by individual provinces as in the case of Intergrated Provincial Support Programme (IPSP) provinces, to ensure ownership and sustainability. Importantly, IPSP Provincial Co-ordinators' involvement in identifying champions is crucial since a high level of co-operation between them is necessary. Similarly, in other learning networks, managers and learning champions have to work very closely together. Importantly, the learning champions are best positioned to identify and co-ordinate learning needs as they are close to projects in their respective provinces.

Capacity/competencies: The capacity and rank of the nominated champion usually is indicative of the level of importance that content owners ascribe to the network as those factors usually impact on the success of the network. High-level thinking individuals who display a sophisticated understanding of priority areas, of learning and its dynamics and who are sound communicators and are diligent are ideal for this responsibility.

Each learning champion will require the support of a small team comprising administrative assistants for logistical responsibilities as well as content experts who might also be project managers.

3. SUPPORT FOR ESTABLISHING LEARNING NETWORKS IN THE PUBLIC SERVICE

In 2001 the Department of Public Service and Administration formalised support for the entrenchment of a learning culture in the public service by establishing the Learning and Knowledge Management Unit (LKM) as the custodian and driver of learning in the public service. The specific brief of the Unit is to establish and support learning networks, particularly in the IPSP Provinces. This forms an essential base for building a learning public service. To this end, LKM pursues this function by:

Marketing the concept of learning

This is an ongoing responsibility as is the developing of any organisation into a learning organisation. The LKM Unit of the DPSA seeks out opportunities for addressing public servants and other partners, with the purpose of illustrating the strategic importance of collaborative learning in the public service, through the facility of Learning Networks. The launch of the LKM Learning Network provided an important platform for marketing the concept through organising of sessions that facilitate leading by example or doing.

Supporting emerging Learning Networks:

- The Unit supports content owners (nationally and provincially) in establishing networks by:
  Providing some funding towards launching of learning

networks in provinces and collaborating with learning champions and content owners on organising the event, particularly on presenters;

- Providing advice and support to learning champions where neccessary on the formation of learning networks and mentoring them in maintaining those networks themselves. This advice will extend to include providing support for the organising of the first two learning sessions of such learning networks. The reason for the “hand-over” of the running of learning networks is to ensure that public servants take ownership of the network developed and to release the LKM Unit to identify other areas for potential networks. Ownership of the network by content owners is essential for sustainability as well as continued relevance in line with their core functions and developments within their areas.
- Proactively identifying potential learning areas and champions and encouraging the formation of networks.
- Launching national learning networks

4. STAKEHOLDERS IN THE SCENARIO OF LEARNING NETWORKS

Stakeholders will be determined by a variety of factors:

- Content/activity or theme around which the network is based
- Benefits to be derived from such a network
- Medium of engagement: e.g. face-to-face or virtual
- Interest in or commitment to the public service (including from other non-governmental sectors)
- Funding support

In the case of the public service, stakeholders will include: public servants (Line Units within DPSA, National/Provincial departments, IPSP Co-ordinators and learning champions), private sector organisations and non-governmental organisations with a public service bias, academics within specific content areas, donors represented by the Programme Management & Development Cooperation component located in the DPSA, etc.

GUIDELINES FOR COORDINATING AND ORGANISING A LEARNING SESSION

The following guidelines will assist content owners, champions, other role players and stakeholders in organising events/learning sessions and establishing learning networks effectively.

The guidelines relate to two areas of activity, namely, **programme (content) requirements and logistical requirements.**

PART 2

ORGANISING LEARNING SESSIONS

A. PROGRAMME (CONTENT) REQUIREMENTS

1. Identifying role players

For learning to take place in the Public Service it is essential that a high level of **co-operation between all stakeholders** takes place. The Learning Champion in each province, department or learning network carries the responsibility to identify all stakeholders, role players and beneficiaries and as such initiates the preparations.

All beneficiaries should, as much as possible, be consulted and their interest in the event established as it should inform their level and/or extent of involvement in preparing for the event. Where necessary, the LKM Unit should play a coordinating role and consult with all stakeholders to discuss preliminary requirements, to ensure that everyone who might have an input is invited, and to prepare a broad outline of preparations - all with a view to making early decisions. This will establish mutual understanding of

- The purpose of the event;
- Programme development
- Presentations and potential presenters
- Specific assignments and how they fit into the total program; and
- Participants

It is essential to hold a meeting or two to co-ordinate the above. Once that is achieved, a written summary of assigned duties should be drafted and distributed to ensure that all the role players involved know who is responsible for what.

2. Content related activities

Prioritisation of learning areas - learning areas relate to core functions and activities of various departments, both provincially and nationally. The learning champion will spearhead the co-ordination of learning areas for the province or the network.

The initial meeting, possibly the launch of the network, should dedicate some time to workshop potential areas for learning in line with identified projects that require learning support. Prioritisation of learning areas **in line with time-frames** for those projects is of extreme importance for instance, if a specific project has to be completed by July, learning support should be provided timeously for learned or acquired knowledge to be applied during implementation. Room should be left for reprioritisation of mandates and projects. This activity and others could be performed electronically (by e-mail or telephone) although it is ideal to do it with all members physically present as they are forced to participate. Preparations for the next session could also start at the end of each session.

Developing a calendar of sessions - the decision on the frequency of learning sessions will determine the dates. It could be once a month, for instance, every first or last Friday of the month, or it could be specific dates in line with project deadlines as suggested earlier. Participants should always be reminded of the next session to confirm the date. There might be a need to shift the date as long as participants are informed in advance and are happy with the shift. This could be due to priorities that emerge, surprises and adhoc requests, etc. Always check for and avoid conflicts with other big events which might split your audience.

Theme identification - for each learning session this involves identifying and getting consensus on the theme for the next session, outlining the objectives of the session as well as identifying the audience (participants). 'Permanent' members will co-opt colleagues, partners and clients in accordance with the content of each sessions. If possible, presenters could be identified at this stage.

Developing the programme - this includes teasing out the theme to identify specific topics and presenters (experts). The program should make provision for adequate time for presentation, questions/comments and breaks (refreshments and lunch).

Securing presenters - Identifying and securing presenters is the responsibility of content owners (Line Units or departmental representatives who are in charge of the specific area). This has to be done early enough to be able to come up with other plans should there be a problem. Securing presenters and developing the programme happen simultaneously, with a lot of refinement between consultations with various stakeholders. Caution is always sounded against packing the programme with too many presentations with little time for discussion. Preference is more for fewer presentations and sufficient time for discussion.

Once you have identified the speakers for your event, the following list could serve as a checklist to ensure their successful participation:

- Confirm by phone and letter the date and time of the event with each presenter or his or her agent. Reconfirm the details by phone one or two days before the event, e.g. parking, where to meet, topics, etc.

- Provide your speaker with a clear, detailed agenda for your event, highlighting his or her portion of the program.

- Make sure each speaker understands your expectations for his or her presentation, length, style/format of the presentation (lecture, discussion, or interaction).

- If a fee is charged for the presentation (not encouraged), make sure you process the payment in time, either on the day of the event or shortly afterwards.

- Obtain biographical information on your speaker to be used in your event program or other literature (brochures, flyers, posters, your introduction, etc.)

- Ask your speaker if he or she has any audio-visual requirements and arrange accordingly.

- Be sure to send a thank you letter or card afterwards. **It is very important to build relationships for future services.**

Developing an informative one-pager - once the programme has been finalised it is important to develop a page which captures the essence and purpose of the session and which will circulate with the invitation for marketing of the session.

Database maintenance - In order to co-ordinate all learning networks, each learning network co-ordinator should develop and maintain, in conjunction with content owners, a database of

- **Participants** (membership lists) the specific areas of activity will determine who gets invited to sessions and their names should be captured and added to specific databases with all their contact details. Transversality of work areas and related activities requires that invitations be targeted broadly across all networks and all membership lists.

- **Experts** - a database of all presenters should be kept for future use for sharing with other provincial partners and networks.

These databases should be updated frequently and a relationship should be built with all stakeholders to ensure that they will inform you of any changes in their details. The attendance register, which is updated at every session, should also assist you in this regard. Sometimes the attendance register is unclear and you will have to phone the members to obtain the correct information/details.

Processing invitations - this is a major area where the Learning Champion needs administrative support. In a lot of cases contact details that are supplied are not up-to-date and e-mail addresses are wrongly captured. It then becomes necessary to make numerous calls to verify those details and to send faxes. Usually, there is a need to resend invitations and then to solicit responses (literally phone each person and confirm attendance).

Capturing and documenting - of learning this is essentially the responsibility of content owners as people who are expert in their fields. Documentation of learning engagements and dialogue is essential for spreading and replicating learning. It is increasingly evident that learning is often confined to physical participation in learning sessions. This approach is limited in that many individuals are unable to participate in particular sessions because of resource and time constraints. To overcome this, the learning network will focus on providing, where possible and in accordance with available resources and capacity, support for documenting the learning session. This includes

- Ensuring that presentations are obtained before the event is ideal. In many cases this is not possible since most speakers finalise their presentations a day or less before the event. In this case try to collect the material at the event. Take additional stiffies to the event and copy the presentations. If the latter is not possible (some presentations are too big to fit on a stiffy) speakers should be requested to provide electronic versions of their presentations soon after the event. It is up to you to make sure that they understand the importance of sharing their experience and knowledge with others.

- Capturing and drafting of appropriate/important learning session summaries/synopses. It is important to develop brief synopses of learning points for further distribution and posting on the web page.

- Content owners are appropriate players in documenting the content and developing detailed reports on sessions. This is important as they will pay attention to those specifics and subtleties within specific content areas that are important for their business and that of their clients.

- Videotaping of certain sessions. It is advisable to video the most important sessions for distribution.

- It is important to post all reports and presentations on the web page.

- Major case studies should be published in publications such as the Service Delivery Review

Identifying & securing a facilitator or programme director - this is an important aspect of organising learning sessions. It is important to identify and secure an experienced facilitator who is also a content expert. It should be a person that can keep the speakers and audience to the time allocated to them, that can keep track of decisions made and provide a summary of the decisions/debates at the end of the event. They may need to guide discussions and ensure appropriate and relevant probing on the topic.

The following guidelines should assist a facilitator towards an effective session:

- Start the meeting on time and end on time
- Greet members/delegates and make them feel welcome
- Set rules for the event and give logistical arrangements (cell phones off, break times, directions to bathrooms and lunch areas, etc)
- Refreshments can serve as a comfortable icebreaker
- Stick to the agenda. Redirect members if they go off on another subject
- Encourage group discussion to gel all ideas and points of view. You will have better decisions and highly motivated members. They will feel that attending events is valuable to them.
- Encourage feedback. Ideas, activities and commitment to the organisation improve when members see their impact on the decisions making process
- Keep conversation on topic and toward an eventual decision. Feel free to ask for only constructive and non-repetitive comments. Tactfully end discussions when they are getting nowhere or becoming disruptive or unproductive.

- Ensure that accurate records of the event are kept for future reference in case a question or problem arises
- Summarise agreements reached and end the meeting on a unifying or positive note.

LOGISTICAL REQUIREMENTS

The size, nature and duration of the learning event will determine which aspects of event coordination and organisation apply in each instance. All procurement procedures should be taken into consideration before embarking on preparations.

1. Determine the costs involved

Some of the expenses to consider include -

- Venue hire (including display area)
- Equipment hire (Audio-visuals)
- Meals and beverages
- Speakers/Presenters/Facilitators
- Travel and Accommodation for some speakers/VIP participants which includes:
    - Airfare
    - Transport between airport and venue (Shuttle service or car - some people prefer a car with a driver)
    - Hotel room (Dinner/Bed/Breakfast)

Identify role players
- Identify all role players and obtain inputs
- Develop summary of assigned duties and responsible person

Identify date(s) and venue(s)
- Decide on frequency of date
- Decide on location and venue
- Remind participants of next session
- Ensure that date does not conflict with other big events

Identify theme
- Outline objectives
- Identify audience
- Identify possible presenters

Identify and secure presenters
- Content owners identify, brief and secure presenters

Develop program
- Make provision for adequate time for presentations, questions, comments and breaks
- Clarify topics with presenters and ensure that the spelling is correct

Develop informative one-pager
- Capture essence and purpose of session
- Identify participants and indicate participants' position (e.g. level, occupation, field)

Identify and Secure Facilitator/programme director
- Select component facilitator
  Must be a content expert

Capture and documenting learning
- L&KM - develop synopsis of learning points
- Content owners - develop detailed report
- Post on web site or distribute

Transferring skills to learning champion
- Provide assistance and advice
- Provide database with all contact details
- Maintain manual

Other optionals include decorations, entertainment, Gifts, if any.

Private sector involvement
The involvement of the private sector is always appreciated in the area of costs. A number of private sector organisations are willing to support learning sessions by sharing lessons and by funding certain aspects of the events, particularly that Government does not normally fund. It is important to clear such contributions with those in charge of finances, such as the Director-General.

2. Securing funding (if necessary) for venue and catering - it is important to determine the source of funding for each session. For privately funded sessions, an arrangement must be made with the donor on what needs to be submitted (invoice) and when. For IPSP sessions the source is clearly the IPSP which requires:

Submission of a workshop requisition form to the Manager: Programme Management Unit that includes:

- Objectives and purpose of learning session
- Estimated cost calculation of the session with quotations obtained
- Requirements for venue, catering, equipment, etc. (three quotes)

3. High-level participants
It is important to determine, before embarking on preparations to establish whether or not the Minister, DG, HODs, MECs and other high-profile participants will be participating. The dates have to be confirmed with them first (through their personal assistants who manage their calendars). If high level personnel are involved, such as the President or Ministers, arrange for a small meeting/boardroom where they can be private. Such a room must also have the necessary equipment requested by them e.g. telephone, fax machine etc. The security staff of the President/Minister should be informed of the location of the venue before the event takes place. Set a date for a pre-meeting site visit to meet with hotel and supplier personnel to

finalize event and function room assignments, menus, and billing arrangements.

4. Travel and accommodation requirements where necessary occasionally some presenters and participants need to be flown in and accommodated. In all instances participants (departments) are responsible for their own travel and accommodation expenses. It is important to:

- Check the flights and process bookings
- Organise accommodation close to the event venue

Remember to use an appropriate/legitimate travel agent that is already used by the department.

5. Venue, equipment, parking and meal requirements

Be sure that the venue has the capability to deal with the special needs of any physically or otherwise challenged individuals within your group. If you are aware of a specific situation, bring it to their attention in advance so it can be dealt with before check-in time.

a. **Location of the venue is always important -** especially in relation to the airport if there are out-of-town participants. The Learning and Knowledge Management Unit in the DPSA has developed a database of venues on the public folders. It is advisable for learning champions or their assistants to build their own databases of venues or to use the link provided on the DPSA Learning Network web site to find suitable venues, caterers, etc. in their provinces.
b. Always provide a **map for direction** with the invitation (scan for e-mail or fax)
c. In many instances Government Departments are happy to provide free **venues** for one-day learning sessions. In such cases venue related costs are saved. In other cases outside venues have to be utilised in both cases it is extremely important to visit and inspect the **venue** and all equipment before finalising the booking.

Remember there are extra costs for equipment unless the champion undertakes to organise such from her/his department.

d. Always check for **acoustics** (sound)
e. Remember to verify availability of appropriate and adequate **accommodation for stay-over** sessions.
f. Brief host and **caterers** on programme and related needs (all equipment including microphones, break away rooms and meal/tea times, etc.).
g. There may be participants with **special dietary requirements** this must be ascertained at the time of circulating invitations.
h. **Parking** is always an important requirement
i. Before signing a **contract**, be sure everything you want is covered in writing.

4. Stationery requirements

Packaging of materials for the event usually there are files to be packed with materials for the event. If some presentations are supplied beforehand, they should be printed and put in individual files for participants.

Organise **nametags** - If you want to develop nametags for the participants it is important to obtain the correct names (and spelling) of each participant as well as information reflecting which departments or stakeholders they are representing. Depending on the number of participants attending, a registration table should be set up with one or two people that could assist with the registration.

7. Media coverage

Liaise with the Media Liaison Officer in your Communications Department on the need and nature of coverage.

Determine costs involved

- Venue
- Equipment
- Travel and Accommodation
- Meals and refreshments
- Speakers/Facilitators
- Décor, entertainment, etc.

Secure funding

- Determine source of funding: sponsorship, donor or departmental funds
- Complete workshop requisition form
- 3 Quotations from each service provider

Determine participants

- Amount and contact details (level/field)
- VIP/High level participants (boardroom)
- Media (if necessary)

(Only in case of big events)
On-site preparations

- Visit site
- Meet all role players and review programme/agenda and discuss final requirements
- Get list on contact details

Determine stationary (If any)

- Pens and notepads
- Files or carry folders
- Manuals, presentations and other handouts
- Nametag holders and cards
- Invitation cards and envelopes
- Programmes
- Attendance register
- Registration table

Determine venue, equipment, parking and meals/refreshments

- Venue: Location, capacity, seating
- Equipment: Standard and additional
- Parking: Availability, cost, location
- Meals/Refreshments: Determine dietary requirements

Send invitations out

- Sent invitations out in time
- Indicate purpose, objectives, venue, date
- Indicate RSVP date
- Indicate dress code

Follow up on RSVP's

- Remind participants at least one week in advanced
- Follow up on RSVP's
- Provide the number of participants to catering company with dietary requirements

Day of event

- Arrive before the event to do final check-up of venue
- Collect presentations and handouts for distribution
- Distribute attendance register

After the event

- Distribute information to participants
- Update the database
- Post information on web site

IN THE CASE OF A BIG EVENT - OTHER ASPECTS AND ISSUES TO CONSIDER

- You may want to give your event a **personalized corporate look** in that case it may be necessary to organise other special materials and equipment some of which can be rented or purchased from the hotel or other suppliers, e.g. directional and/or identifying signs. You will need to organise banners for the event.

- Arrange with the facility staff for the setting up of these materials before the event. **Visit the hotel/conference facility** and plan the layout of the venue and determine how you will display the posters (some facilities do not approve putting posters on the walls), banners (is there space and how will the banner be displayed - standing or hanging).

- Also indicate to facility staff whether notepads and pens **(stationary)** should be included in the conference package, flowers at reception area/table, colours of decorations and overlays.

- Develop and provide an **attendance register** at the event that would request the names and contact details of the participants. This information is important in order to sustain the learning network and provide participants with the opportunity for networking after each event. It will also enable you to provide the participants with the necessary information after each event.

- If it is a special event for **VIP** people you could allocate personnel to show the VIP's to their seats.

On-Site Preparation

Plan to arrive early to allow adequate time for set-up rehearsals, and problem solving. Depending on the size and complexity of the program, this may range from a few hours to several days.

- Find out who will be your contacts within the hotel or at outside suppliers at all times of the day or night, if problems crop up. Record their office, mobile and (if possible) home phone numbers.

- Meet as a group with hotel staff and other suppliers involved in all aspects of the event to review the program and agenda from start to finish: Transfers, cancellations, audio-visual requirements, room set-ups and turnaround times, changes requested previously, etc., to be absolutely certain every one is on the same wave length.

- Bring along a list of contacts, including mobile/home phone numbers, of anyone you may need to reach for any other last minute crises.

- If an outsider will introduce your speakers, or vice versa, be sure they understand the pronunciation of the person's name and title. If VIP guests are to be introduced, be sure they are in attendance. If there are last minute additions to the VIP introductions list be sure your presenter is aware of them.

- Do a last minute check of the meeting room for lighting, temperature, water (at the podium and for attendees), pads, pencils, and any other special requirements such as a pointer or gavel. Also ensure that people are at the registration table to assist participants and that there are people to welcome VIPs and show them to their seats.

AFTER EACH LEARNING SESSION

- After each event the database for the participants should be updated (Outlook has a facility for contacts which is very user-friendly and can assist in sending e-mails to all participants with a touch of a button).

- The presentations and report must also be provided to the web manager for posting on the Learning Network web site.

- Where participants have no access to web facilities, record and distribute reports and presentations to all participants (via e-mail, fax, etc.) as soon as possible after each event. To avoid this responsibility it is ideal to distribute during the session.

ANNEXURE A

This form can assist you in planning your conference or event. These items are a few examples to keep the bigger picture in mind and to ensure that your conference or event is smoothly executed. Feel free to print this form, use and modify it for your special requirements.

WHAT WHY	WHO	WHERE WHEN	HOW
General			
Define overall timeline			
Define event goal and objectives			
Define your overall budget			
Determine committee meeting schedule			
Logistics			
Define venue requirements			
Define and arrange equipment needs			
Define accommodation requirements			
Define travel requirements			
Define catering requirements			
Identify guest presenters			
Develop contingency plans			
Define the skills/know how needed to execute the event			
Marketing and Promotion			
Define target publics and plan how to reach them			
Compile contact details/media channels of target publics			
Research and select media vehicles to run your campaign			
Prepare invitation, advertisement or media plan			
Prepare for media conferences, media releases and appoint spokesperson			
Design and print promotional items, invitations and brochures			

ANNEXURE B

Expenses

This form can assist you in budgeting for your conference or event. These items are a few examples of typical revenue and expenses. Remember that there are fixed cost, e.g. venue hire and variable costs, such as meals which will depend on the number of meals supplied. Feel free to print this form, use and modify it for your special requirements.

EXPENSES

Administration and Personal		R ________
Organising Fee / Professional Fee	R ________	
Temporary Staff	R ________	
Translation Costs / Data Capturing Costs	R ________	
Stationary and Office Supplies	R ________	
Telephone / Mobile phones / Faxes / E-mail	R ________	
Postage	R ________	
Printing	R ________	
Presenters		R ________
Presenters - Presentation Fee	R ________	
Presenters - Travel and Accommodation	R ________	
Venue / Facilities / Equipment		R ________
Venue Hire	R ________	
Additional Rooms	R ________	
Multi-media Equipment	R ________	
Tables / Chairs etc.	R ________	

Accommodation and Travel		R ________
Rooms for Delegates / Presenters / Organisers	R ________	
Flights / Bus / Taxi / Transfers	R ________	
Pre- or Post-conference Tours	R ________	
Catering and Functions		R ________
Meals	R ________	
Special Functions	R ________	
Special Meals	R ________	
Entertainment	R ________	
Decor	R ________	
Advertising / Marketing		R ________
Advertising	R ________	
Marketing Campaign	R ________	
Media Plan and Liaison	R ________	
VAT		R ________
Contingency		R ________
SUB TOTAL		R ________
REVENUE		R ________
Registration Fees	R ________	
Sponsorships / Grants	R ________	
Advertising / Exhibitors	R ________	
Other Income	R ________	
TOTAL		R ________