

## NEW PERSPECTIVES

## How to Conduct a Workshop: Nine Steps for the First-time Workshop Leader

Somnath Mookherjee, MD, and Daniel Cabrera, MD, MPH

*Dr. Mookherjee is assistant professor of medicine, and Dr. Cabrera is clinical instructor of medicine at the University of Washington.*

Leading a workshop is one of the highest-yield academic efforts that a faculty member can undertake: It can help build a regional reputation, generate opportunities for collaboration with colleagues, and establish an educational niche. Proposing and leading a workshop may seem like a daunting task in the face of competing commitments. This article provides specific steps to develop a successful workshop.

### Step 1: Consider the topic, target audience, and goal.

Our professional lives are replete with opportunities to improve our practice: clinical care, quality improvement, teaching, leadership, or any number of aspects of physician-ship. Determine which of these topics synergize with your own goals and interests. It is not necessary to be an expert on the topic; you can always collaborate with content experts, and you will gain expertise as you develop the workshop. Consider the audience for your workshop, and clearly state the overall goal, such as: "To help clinician-educators improve quality improvement education for medical students on the wards," "To improve the perioperative care of patients with pulmonary hypertension," or "To increase the number of workshops offered by faculty." As you formulate these initial ideas, gather information specific to the venue you are considering (i.e. regional meeting, national meeting, or institutional faculty development). Also consider the length of the workshop, potential meeting themes, and the number of presenters permitted to be on the workshop team.

### Step 2: Make sure that people will be interested.

It is not necessary to perform a rigorous needs assessment for your workshop, but it is essential to have some evidence that the workshop is needed. This is true whether you are considering creating a workshop for a regional or national meeting or a faculty development workshop for your group or division. Potential sources of input to validate the importance of your project include endorsement of the idea by leadership (e.g. chair, division head), interest in the idea at a faculty meeting, and survey or focus group data showing a need for the topic to be addressed.

### Step 3: Create specific objectives.

The overall goal of the workshop (from Step 1) will most likely be reached if participants achieve specific well-designed objectives that enable them to reach the goal. To create good objectives, explicitly state the knowledge, skills, and attitudes that participants will attain as a result of attending the workshop. Table 1 summarizes three key tips for writing good objectives.

### Step 4: Make a workshop team.

As you invite partners, consider what needs you are seeking to fill. Do you need a content expert or someone with prior workshop experience? Keep in mind that the workshop process is also an opportunity to develop a relationship with a mentor or create a connection with faculty at a different institution. As with any project, it is important to delineate roles and expectations beforehand. Table 2 outlines specific components that are helpful to include when inviting a col-

league to join your team.

### Step 5: Brainstorm strategies, and start creating the content.

Ask yourself: What is the best way for the participants to achieve the learning objectives? Effective workshops employ active learning strategies—this is really what makes a workshop a workshop rather than a lecture. Table 3 gives some examples of active vs. passive strategies. Align the teaching techniques with the audience and the objectives. Ask yourself: What gives us the best chance that the participants will achieve the learning objectives at the end of the workshop? Start thinking about creating materials that will enhance the workshop, such as handouts, videos, or materials needed for hands-on activities.

### Step 6: Create a detailed agenda.

This is a critical step in creating a successful workshop. Once you have an idea of the content and teaching strategies you will use, create a chart using the column headings in Table 4. Outline the workshop agenda in detail; improvising never works. One of the most important components of a workshop is the introduction. Create an introduction that quickly engages the audience and makes it clear that your workshop is relevant for attendees. One effective strategy is to ask for a show of hands to questions that highlight the importance of your workshop goals and objectives. For example, for a workshop on physical examination skills, you could say, "Raise your hand if you have ever taken care of a patient with new cardiac signs and symptoms. Raise your

continued on page 2

## NEW PERSPECTIVES

continued from page 1

**Table 1. Three Tips for Writing Good Workshop Objectives**

1. Make objectives relevant to the actual professional practices of participants.	2. If objectives are not practice oriented, make sure that they are anchored on demonstrable and measurable skills and behaviors.	3. Avoid common pitfalls.
<ul style="list-style-type: none"> <li>• “By the end of the workshop, participants will be able to treat decompensated heart failure.”</li> <li>• “By the end of the workshop, participants will be able to teach students how to estimate jugular venous pressure.”</li> </ul>	<ul style="list-style-type: none"> <li>• “By the end of the workshop, participants will be able to summarize the three key components of heart failure management.”</li> <li>• “By the end of the workshop, participants will be able to demonstrate how to estimate jugular venous pressure.”</li> </ul>	<ul style="list-style-type: none"> <li>• <i>Don’t be boring.</i> No one wants to attend a workshop to be able to “list” something at the end.</li> <li>• <i>Avoid non-action words</i> like “describe” or “discuss” as objectives.</li> <li>• Remember, objectives are not a description of what you or the participants will be doing during the workshop but rather what the participant <i>will be able to do</i> as a result of attending.</li> </ul>

hand if you are very confident that you know how to accurately estimate the jugular venous pressure. You are all in the right place. By the end of this workshop, you will be able to accurately estimate jugular venous pressure and teach this skill to trainees.”

As you work on the detailed agenda, keep the following tips in mind:

- Be prepared for variation in group size. Have a contingency plan whether there are five attendees or 25 attendees.

- Transitions between parts of the workshop can be awkward. Write down key transition phrases so these go smoothly during the workshop. Have a transition slide in your presentation to make transitions explicit and intentional.
- For active learning activities, give precise instructions to participants. How many times have you been to a workshop where participants look at each other and ask, “What are we supposed to be doing?”

- Remember that it is much better to be too short than too long; leave plenty of time for discussion.
- Account for variations in the venue. Room size and table and chair arrangements may not be as expected.

**Step 7: Practice and fine tune.**

Run through the entire workshop at least once with the entire team prior to presenting so that all team members are comfortable with their

continued on page 3

**Table 2. Considerations When Inviting Colleagues to Join Your Workshop Team**

Component	Examples
<p><i>Planning role:</i> You should be clear about how much input you need or want.</p>	<ul style="list-style-type: none"> <li>• “I have a general idea of the topic of the workshop; I invite you to join the team, brainstorm ideas, and help draft the workshop proposal.”</li> <li>• “I have developed the main goal and specific objectives for this workshop; I would appreciate your input on how to best teach the material.”</li> <li>• “Given your extensive workshop experience, I would like to ask you to mentor me through the proposal and presentation process.”</li> </ul>
<p><i>Workshop role:</i> It is helpful to think about “stage time” before inviting colleagues to join the team.</p>	<ul style="list-style-type: none"> <li>• “Please co-lead the workshop.”</li> <li>• “Please help lead one of the small groups.”</li> <li>• “Your role in presenting the workshop will be determined as we develop the agenda.”</li> </ul>
<p><i>Time commitment:</i> This should be a realistic estimate; you don’t want to recruit a “big name” if they don’t have minimal availability.</p>	<ul style="list-style-type: none"> <li>• “If you are able to join the workshop team, I would ask that you be available to edit and make comments on the workshop proposal within the next month, join the team for two one-hour meetings to practice prior to the presentation, and attend the regional meeting where we will be presenting the workshop.”</li> </ul>

## NEW PERSPECTIVES

continued from page 2

**Table 3. Passive and Active Learning Strategies to Achieve Workshop Objectives\***

Passive Learning					Active Learning		
Pure lecture/ non-participatory didactics	Audience response systems	Large group discussion	Reflection, sharing with a partner and sharing with the group	Large group brainstorming, case studies	Small group discussion/ tasks and sharing with the group	Simulation and role-playing	Hands-on activities (experience- based learning)

\* Based on the work of Chris O’Neal and Tershia Pinder-Grover at the Center for Research on Learning and Teaching, University of Michigan, and adapted with their permission. Original document available at: [http://www.crlt.umich.edu/sites/default/files/resource\\_files/02\\_Active%20Learning%20Continuum.pdf](http://www.crlt.umich.edu/sites/default/files/resource_files/02_Active%20Learning%20Continuum.pdf)

roles. If some team members are in different locations, timing should be arranged ahead of time by phone rather than waiting for the day of the presentation. You will likely find that certain parts take longer than you expected. Strongly consider seeking out lower-stress opportunities to present the workshop prior to the “main event.” Oftentimes, workshop topics are appropriate for resident lunch meetings or faculty meetings.

### Step 8: Master the logistics.

Logistical snafus can sour what would otherwise be a successful workshop; realize that it is ultimately your responsibility to make

sure that things run smoothly. This means, whenever possible, testing equipment at the venue beforehand, having a back-up plan for audiovisual glitches, and being self-sufficient with equipment, such as laser pointers and speakers. Be sure to have your materials printed out ahead of time.

### Step 9: Use feedback and reflection to modify future presentations.

Immediately after the workshop, take a few minutes to enjoy the high points of the experience, and reflect on what specific modifications would improve the next presentation. While most conference workshops request

evaluations of participants, an evaluation you create specifically for your talk may be more useful. Consider handing out your own evaluation form that asks for feedback on how well your stated objectives were achieved, leaving space for constructive feedback.

### Conclusion

Offering a clinical or educational workshop is a highly rewarding activity for faculty at all levels. Not only do your colleagues have the benefit of your teaching, conducting a workshop enhances your visibility and can open the door for future opportunities.

SGIM

**Table 4. Column Headings for Detailed Workshop Agenda**

Slide No.	Section	Content	Important phrases	Speaker	Objectives addressed	Minutes
	Introduction, objectives, didactic, activity, etc.	What’s going on right now?	What to say to highlight relevance in the introduction? How to transition from didactics to learning activity?	Who says what and when?	Is all the content somehow directed toward achieving learning objectives?	Estimate how long it will take; revise after practicing.