Managing a Public Speaker Bureau

A Manual for Health and Human Services Organizations

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and
Evelyn González-McDevitt

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Kluwer Academic/Plenum Publishers
New York, Boston, Dordrecht, London, Moscow

Library of Congress Cataloging-in-Publication Data

Gambescia, Stephen F.
Managing a public speaker bureau : a manual for health and human services organizations / Stephen F. Gambescia, Evelyn Gonzalez.
p. cm.
Includes bibliographical references and index.
ISBN 978-1-4757-0985-8 ISBN 978-0-306-48567-1 (eBook)
DOI 10.1007/978-0-306-48567-1
1. Health facilities—Administration—Miscellanea. 2. Public speaking—Miscellanea. I. Gonzalez, Evelyn. II. Title.
RA971.G356 2004
362.11'0684—dc22

ISBN 978-1-4757-0985-8

© 2005 Kluwer Academic/Plenum Publishers, New York
Softcover reprint of the hardcover 1st edition 2005
233 Spring Street, New York, New York 10013

http://www.wkap.nl

10 9 8 7 6 5 4 3 2 1

A C.I.P. record for this book is available from the Library of Congress

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Preface

When health and human services organizations (new, established, or mature) engage in a strategic planning process, invariably the suggestion is made to offer a public speaker bureau to support their mission. As a professional in the health and human services field, you probably have encountered, to some degree, the services provided by an organization's speakers bureau. You have heard speakers representing organizations or you may have been a staff or volunteer speaker for an organization. Public speaker bureaus are ubiquitous.

Providing a public speaker bureau usually makes sense. It provides an easy and relatively inexpensive way to impart useful information to your constituents or the public, or serve as a marketing or fundraising tool. A public speaker bureau can increase your visibility in the communities that you serve or would like to serve.

Throughout our score of years of experience in the health and human services fields, we were struck by the lack of attention given to most organizations' public speaker bureaus. Again, while most organizations felt the need to have a speakers bureau, relatively little attention was given to the management and evaluation of this service. In fact, few organizations spent quality time determining whether or not a public speaker bureau was, indeed, needed and, if so, what should be its strategic purpose in serving the mission of the organization. More disconcerting was the real possibility that a poorly monitored speakers bureau could have a damaging impact on an organization's reputation in the communities that they serve. Ironically, while many organizations were using a speaker bureau for its "public relations" value, if not organized with care, the service could actually cause a public relations nightmare. Furthermore, with few organizations evaluating their public speaker bureau, the source of the negative impact could go unnoticed or the positive impact could hardly be supported with more resources.

Why does such a common health and human services activity get such little attention? We suspect that organizations do not intend to neglect their public speaker bureau. In fact, even the mature and well-resourced organizations neglect this service. The intentions were usually good. A public speaker bureau can have an impact on their mission and benefit the organization. However, over time organizations lost interest in the speakers bureau or relegated the function to a staff member who was ill equipped or not properly trained to implement the service. The public speaker bureau is usually not a core service, thus does not receive adequate staff time, attention, and funding. And many organizations simply believe that it is easy to operate a public speaker bureau or that it requires scant organizational resources.

We discovered that there were few materials available to guide a staff member or the leadership on how to run a public speaker bureau for a health and human services organization. Most available give a cursory summary of the most obvious steps and neglect giving the reader valuable information learned from a School of Hard Knocks on the subject. But we knew there was much more to managing a public speaker bureau than any of these materials provided. There is organizational science and art to this work. If managed correctly, the speakers bureau can have a favorable impact for organizations. We also suspect that once the essential elements and best practices are in place, it would not be difficult to manage a public speaker bureau. With a little bit of attention and perseverance, this activity will be run efficiently and effectively to support the mission of the organization.

We began to look critically at our health agencies' speakers bureaus back in the mid 1980s. We worked for metropolitan divisions (Greater Philadelphia) of two large and mature voluntary health agencies: American Cancer Society and American Heart Association. We began by asking the most fundamental questions about a public speaker bureau. What is the purpose of the public speaker bureau and how does it contribute to the mission of our organization and strategic plan? How can we best organize our speakers bureau to maximize our staff, volunteers,' and clients' time? And how can we monitor and evaluate our public speaker bureau to ensure its intended purpose, high quality, and know that it provides an overall positive experience for all involved?

These speakers bureau programs were used by almost all organizations and sectors at the school site, health care site, work site, military installation, university, and community settings. Thus we gained a broad perspective on managing or supervising those managing a public speaker bureau. And very importantly, we identified the many pitfalls and potential problems that can occur while providing this service in the communities that we served. We involved other functional areas of the organizations (development, communications, warehouse, support staff) and kept the executive directors and board apprised of our progress. We involved our speakers who contributed their expertise and volunteer time to this long-standing, but relatively unquestioned, organizational activity. We examined the workings of other organizations' speakers bureaus with which we were affiliated.

These investigations, observations, and exercises placed us in an excellent position to design and write this book that outlines and explains the *essential elements* of a well organized and meaningful public speaker bureau. We have identified the critical success factors for offering this service to constituents and communities. In mastering these essential elements of a speakers bureau:

- defining the purpose;
- recruiting and training speakers;
- creating publicity;
- securing tools and resources;
- maintaining appropriate client interaction;
- monitoring; and
- evaluation,

you can put into place and manage a speakers bureau that will get results and increase the satisfaction level of staff, volunteers, and participants who are exposed to this common educational service.

The chapters appear in a sequence that we feel you will follow in designing and managing a public speaker bureau for a health or human service organization, even if you are revising your current program. Thus we recommend that you read the manual from beginning to end first, and then skip around for review or emphasis.

We give a number of sample tools as exhibits or sidebars that we found useful in managing a speakers bureau, such as speaker recruitment letter, agenda for training sessions, check lists, and several program evaluation forms.

Chapter One covers the first and most important step: determining the need and purpose of a public speaker bureau. Not every organization needs a speakers bureau. It is worth the exercise to make an informed decision upfront or reevaluate the need for this type of program. If you decide to have a speakers bureau, it is useful to determine just what that purpose (or purposes) should be. We ask you to keep in mind that the purpose is not simply an iteration of the existing mission statement of the organization. The purpose needs to support the mission as one of several strategies in advancing the mission. And the purpose, or focus, of the speakers bureau can change over time. Successful speakers bureaus are purpose driven. The clearer your purpose, the easier it will be to promote and manage your speakers bureau.

Chapters Two and Six address how best to prepare your promotional materials and how to gain publicity to generate requests for this service. These strategies will guide you in communicating to the appropriate audiences the benefits of your service, the expectations for the users, and the parameters and conditions under which you can provide the service.

Chapters Three to Eight provide the bulk of material for this manual. Here you learn the best practices for recruiting, orienting, training, and supporting the most important asset of your program: your speakers. These chapters are filled with tried and tested tools that not only assist in the smooth delivery of the service, but also ensure quality programming expected from your constituents. Furthermore, with a little effort in using these tips and tools you will save much time for all involved in this service—something not considered in the management and delivery of most public speaker bureaus in health and human services organizations. Many of these tools you will see for the first time. Overall these aids and strategies ensure that all involved will have a positive experience with this service.

In these chapters we cover the critical success factors that increase the chances of your speaker arriving at the correct place, on the correct date, and at the correct time, to deliver the appropriate messages—all without incident. One goal of this manual is to impress upon you that no detail should be left to chance, or at least not considered. A longtime mentor once told us that many professionals will get the big things right, but it is the little things that can impact, even in subtle ways, the quality of your programs. This chapter exposes many important details in delivering organizational messages via a public speaker bureau.

By their nature, health and human services programs benefit from good evaluation. Our experiences have shown that few organizations conduct more than a cursory evaluation of their speakers bureau. And few include all participants in the evaluation process. Chapter Nine outlines, details, and gives examples on how to evaluate all aspects of the speakers bureau and include the participants: audience, site coordinator contact, and speaker. You will learn about useful evaluation instruments that tell if you are achieving your purpose and providing a quality service. We will show evaluation tools that give all an opportunity to give feedback on their experience with your organization and this service.

Your public speaker bureau deserves continual evaluation and improvement efforts. These evaluations are generally organized around the *process* of you delivering the program (formative evaluation) and the *outcomes and impact* that you are making (summative evaluation). You need to be aware of how all of your constituents feel about the success of your speakers bureau, real or perceived, and you need to be willing to ask the "so what?" question. As a practical matter, not all aspects can be measured and not all constituents can weigh in on your progress. This chapter guides you in conducting evaluations on what you can practically measure and, more important, what you will actually use when honestly asking the "How are we doing?" question. With some simple steps that you can develop and expand over time, you will be able to gain more than a feel for how you are doing with your public speaker bureau.

The last chapter, Ten, provides a summary and some final tips on designing, delivering, and evaluating a quality speakers bureau program.

Managing a speakers bureau can be a fun, useful, and rewarding responsibility within an organization. While, at first thought, it seems to be an easy service to manage and implement, it deserves care, attention, and focus. By reviewing the essential elements and following some easy planning, implementation, and evaluation steps outlined in this book, you can provide a speakers bureau that has an impact for the mission of your organization and demonstrates that you are worthy of your constituents' support. We hope you enjoy managing your organizations public speaker bureau as much as we have over these past years. By completing this manual, we hope that we have made your job a little easier and saved you time so you can continue your good work in the health and human services field.

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Acknowledgments

We acknowledge all of the speakers who volunteer their time on public speaker bureaus to meet the health and human services missions of their organizations.

We acknowledge our co-workers, volunteers, and executive directors from the American Cancer Society, Philadelphia Division, and American Heart Association, Southeastern Pennsylvania Affiliate for having an opportunity to work with them in managing various speakers bureaus during our tenure. (These entities no longer exist given restructuring within the agencies.)

We thank Jerry George Botto and Susan Myers for their reading of the manuscript.

Authors' Profiles

Stephen F. Gambescia has 23 years of experience in the health and educational services field. He has managed or supervised those managing speakers bureau programs for several health and educational organizations. He has worked closely with the co-author to design a purpose driven, systematic, and quality public and professional speaker bureau program for the American Heart Association's Southeastern Pennsylvania Affiliate. He has also evaluated the utility of speakers bureaus as a member of several health and human services organizations' boards.

Dr. Gambescia has held a number of educational leadership roles, such as Vice President for Corporate Relations, American Cancer Society and Vice President for Educational Programs and Research, American Heart Association in these Greater Philadelphia divisions. Working with an interdisciplinary team of health promotion/disease prevention professionals, he has extensive experience in planning, implementing, and evaluating novel health promotion programs at community sites, healthcare sites, worksites, and school sites. His research interests have been in a broad range of tobacco control initiatives, including smoking cessation, youth deterrence, youth access to tobacco, and smoke-free policy development in the public and private sectors. He has expanded this research to health communications and social marketing techniques in chronic disease control and injury prevention.

Dr. Gambescia is currently Dean of Graduate and Professional Studies at Cabrini College, Radnor, PA. His research interests in higher education include continuing professional education program development, evaluation, and credentialing and distributed learning.

He received his first undergraduate degree in sociology from Saint Joseph's University (Philadelphia) and a degree in journalism/public relations from Charles Morris Price. He holds a master of education degree from The Pennsylvania State University, and a master of business administration from Regis University (Denver). He earned his doctoral degree from Temple University where he studied public health policy.

Evelyn González-McDevitt has spent the majority of her professional career in public health addressing the educational needs of minority and medically underserved communities. Over the past twenty years, Ms. González-McDevitt has worked with health professionals to address issues of health disparities and cultural competence in the delivery of healthcare. She has worked with diverse populations in a variety of disciplines including reproductive health care, genetics, cardiovascular disease, and cancer control.

Ms. González-McDevitt is currently the Partnership Program Manager for the Atlantic Region Cancer Information Service, a program of the National Cancer Institute located at Fox Chase Cancer Center in Philadelphia, PA. She directs a team that provides technical support in program planning, implementation, and evaluation of health promotion and prevention programming. She has been invited to consult on a number of national minority outreach health services programs. Her research interests have been in the area of behavioral health and health communication.

Ms. González-McDevitt has managed all facets of a speakers bureau and co-developed a comprehensive approach to establishing and administering a successful speakers bureau for a major voluntary health agency.

She received her undergraduate degree in Political Science from Chestnut Hill College, Philadelphia and holds a master's degree in health advocacy from Sarah Lawrence College in New York.

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Introduction

A *Public Speaker Bureau* has been a popular and long standing service of most health and human services organizations. As professionals we have encountered, to some degree, the services provided by an organization's speakers bureau.

A speakers bureau can have a number of purposes and benefits for a health and human service organization. For example, health agencies most often use a public speaker bureau to impart health information and health promotion messages to their communities. An environmental group may use a speakers bureau to alert the public about environmental hazards that exists in the area and could be ameliorated via public policy intervention. A women's shelter may use a speakers bureau to increase the public's awareness of domestic violence issues and gain contributions to their agency which is providing an important direct service to women and children in a community. A museum may use a speakers bureau to educate groups about its potential cultural contributions to the community.

While the educational value of offering a public speaker bureau service is, at times, questionable, most educational organizations could benefit from a *well organized* and *purpose driven* speakers bureau. Unfortunately most organizations do not have a well-organized speakers bureau. They react to a request for a speaker from a group with little planning, oversight, and evaluation of the process. This creates a number of problems for the organization, its staff, volunteers, and ultimately impacts on its mission to provide high quality services to the communities it serves. Ironically, most of us have had some interaction with a speakers bureau; however, few organizations or educational leaders utilize the *essential elements* needed to maximize the benefits of a speakers bureau and make it work for their agency.

To maximize staff, volunteer, and the learners' time, and to have greater impact, an organization's Public Speaker Bureau should be 1) purpose driven, 2) systematic and well organized; 3) involve the knowledgeable, skilled and appropriate speakers; and 4) continually evaluated.

This manual will outline and explain the *essential elements* of a well organized and meaningful public speaker bureau. In outlining these essential elements you can put into place and manage a speakers bureau that will get results and increase the satisfaction level of the staff, volunteers, and participants exposed to this common educational service. These tried and tested elements will help you monitor the steps and tasks involved in managing a speakers bureau. They will save you time. They will help you avoid embarrassing situations when things go wrong—and there are potentially many—with a speaking engagement. They will increase your staff and volunteers' willingness to get involved in your organization. They help to increase your credibility in the community as a well-run organization worthy of the community's support. And most important, these elements will improve a basic educational service that should contribute to your organization's mission.

OBJECTIVES

This manual aims to:

- Show how your organization can establish a *purpose driven* public speaker bureau
- Outline steps and systems for speaker recruitment, training, and evaluation
- Show how to publicize your speaker bureau service to constituents and the communities that you serve
- Provide ideas on how to equip your speakers with educational tools that make for a more useful and interesting presentation
- Outline ways to monitor the speaker request and final delivery of this educational service
- Create ways to increase customer satisfaction for those who use your educational service
- Demonstrate the importance of sharing a positive institutional message for your organization and its mission in the community
- Give sample tools to evaluate the process and educational value of your speakers bureau

ESSENTIAL ELEMENTS

More specifically this manual will outline the *essential elements* to a purposeful and organized Public Speaker Bureau. It gives examples and sample tools that will make your job easier and make you more successful as a manager or coordinator for your organization's speakers bureau. It will cover:

- Defining the purpose of your organization's public speaker bureau
- Creating a brochure for your speakers bureau
- Recruiting speakers for your speakers bureau
- Training speakers who are in your speakers bureau
- Choosing educational tools and resources for your speakers
- Publicizing your public speaker bureau
- Processing speakers bureau requests
- Interacting with the group's contact/coordinator
- Securing a speaker for an engagement
- Confirming the speaking engagement
- Identifying critical success factors for the date/time/place of the speaking engagement
- Evaluating the presentation
- Evaluating the speaker bureau experience for all parties: speaker, inviting group's coordinator, and the audience
- Implementing continuous evaluation and improvement

CHAPTER ONE

The Purpose of Your Organization's Public Speaker Bureau

The first step to establishing or revitalizing a public speaker bureau for a health or human services organization is to *clearly define its purpose* to the organization at a particular time. What do you want the speakers bureau to do for your organization or how can the speakers bureau best serve your constituents? This purpose is not the same as knowing the overall purpose or mission of an organization. The speakers bureau is a means to that end. It is an educational or communications strategy that helps fulfill the mission of your organization. The purpose should somehow be tied to the mission of the organization.

A public speakers bureau could have *several purposes* to assist the organization. Here is a sample list:

- To impart useful information to groups or the public at large (e.g., health, safety, cultural)
- To educate groups about the purpose and mission of an organization: telling folks what your organization does, and why
- To increase the visibility in the community of your organization
- To showcase the staff and volunteers of your organization
- To educate the community so they can advocate for change (e.g., lobby for the passage of a piece of clean air legislation)
- To gain the public's support, often times financial, for the work that the organization is doing
- To ready the public for a special event

It is important for your organization and its organizers of the public speaker bureau to know what is needed from this educational service. The purpose, and again there could be several, should be clearly stated and understood by those involved in the managing and delivery of the speakers bureau's message(s). The purpose should relate to a goal or objective of the organization and should be a *current need.* While market sensitive and customer relations oriented organizations know that we should be willing to hear and learn what the community is "interested in," an organization that doesn't spend some time in planning how its speakers bureau can advance the mission of the organization is missing out on opportunities to communicate with its constituents.

Successful speakers bureaus are *purpose driven.* Your organization needs to take the time, up front, to determine just what the purpose of the service should be. Spend time with your staff, board members, and supporters to learn what is needed. Then, the decision must be made whether a public speakers bureau is right for these objectives. Make a more formal or systematic study of your current requests to see what issues are important to your constituents who at least know how to reach you for an educational service. Survey other groups or people from whom ordinarily you do not hear, but you would like to reach with your messages. You may be surprised to learn that what you have been offering has little impact on your constituents or is of little interest to them. You may also identify a new and exciting opportunity for the public speaker bureau to advance the mission of your organization.

You can look to the organization's strategic plan to see how a speakers bureau fits. If your organization does not have a strategic plan, or is about to undertake one, be sure to ask how a public speaker bureau could fit into this important organizational document.

While this first step seems fundamental, most organizations do not invest the proper amount of time in this area or have not reevaluated their needs in a long time. Unfortunately, if there is a mismatch with an organization's speakers bureau and the true needs of the organization, the service is not only ineffective, but it is wasteful of valuable time and resources. At best it becomes a value neutral service. At worst, it could actually be causing you harm in carrying out your stated mission. Once you have determined the purpose of your public speaker bureau, keep it in the forefront of your planning and continually remind those involved with the program. Periodically revisit the purpose so it stays fresh in your thinking and becomes your driving force. One organization prints its speaker bureau purpose statement on several documents used for the orientation and training of its speakers. Knowing the purpose keeps you well grounded and focused in your work.

Take the time to define the purpose and objectives of your organization's speakers bureau. Then you can begin the planning, implementation, monitoring, and evaluation of this educational service.

CHAPTER TWO

Creating Your Promotional Material

Health and human services organizations are usually adept at creating brochures and promotional materials. Your main public speaker bureau brochure or web page is important. It should be tailored and produced to fit your local needs. Individuals responsible for managing, coordinating, and working with the bureau should be closely involved or consulted during its production.

The main promotional piece gets everyone, especially the groups who will use your service, off to a good start in learning the purpose of your organization's public speaker bureau, the expectations of what you can deliver, and the conditions and parameters under which you can provide such a service.

Your brochure and/or web page—regardless of its design, length, and style—should include the following:

Essential Elements in a Public Speaker Bureau Promotional Tool

- Uniquely Identifies Your Organization
- Aesthetically Attractive
- Benefits Statement
- List of Topics
- Request Form
- Procedures, Policies, and Conditions
- Other information

UNIQUE IDENTIFIER

This element is essential to good organizational communications. Your public speaker bureau promotional piece should have on its front elements that clearly identify it with your organization. Usually this is simply accomplished by having your organization's name, logo, and color schemes. Abide by your organization's graphics and publishing standards. If you have a public relations or communications office, ask a staff member in that department for direction in this area.

Your organization's logo should be front and center on these materials or your website. If you choose to use a logo for the public speaker bureau, as some organizations do, make sure this logo is an *addition* to your organizational logo. Separate programmatic logos can be useful, creative, and fun, but be careful not to neglect your organization's unique identifier.

One board member graphically demonstrated to us how our agency was slowly losing its unique identifier by lining our educational materials on the boardroom table. He rhetorically asked if we could pick out our unique identifier among the many new and creative materials. While we gave enthusiastic approval to the new names and logos for these individual programs, we were neglecting our simple and unique identifier so when the public saw our materials they connected the program to us. Sometimes programmatic logo madness overshadows the larger organization's image. The public needs to associate this public speaker bureau promotional piece with your organization. The organization supports your public speaker bureau program; therefore, it deserves the right to have branding exposure to your audiences.

AESTHETICALLY ATTRACTIVE

Another basic element—the promotional piece should be attractive and communicate its overall purpose. The promotional piece should follow whatever graphic guidelines have been set by your organization and be generally consistent with the look and "feel" of your other publications. If your organization is new and has little experience in graphic standards, a good rule of thumb would be to establish a clean look first, before making a "creative" leap that risks being too busy. Clean usually works first, giving you time to evolve into something more creative that matches the overall look of your organization or a special look for this service. Any special public speaker bureau look should not overshadow the general unique identifier features of your organization.

Do not be afraid to turn down ideas that are not working, regardless of who offered them. Consider asking a consultant for help with establishing an overall creative concept for your promotional materials. There are many services available at a reasonable price. However, you should have the liberty to not use ideas and materials that are not a good fit for your programs, even if you paid for them. Often staff get taken over by the excitement of the moment to get something on the street and are reluctant to slow the process to see another rendition of the marketing materials. You have a chance to create a good marketing piece or web page for your program; it is worth the time to do this right.

BENEFITS STATEMENT

Use your marketing skills in this section of the promotional piece to "sell" your groups on why they should request a speaker from your organization. Pick a few benefits and describe them in your promotional pieces. Create interest and excitement. Note why your organization is best suited to provide this educational service. Display your unique selling point(s). Project a sense that your organization exists to serve and is ready and able to deliver a quality program.

A local American Heart Association's brochure started its benefits statement with the following:

> If you run a business, operate a health agency, teach a class or belong to a community group, and are concerned about the risk of heart disease and stroke, the American Heart Association has an effective way for you to educate your audience.

After a brief paragraph noting the problems of heart disease in America the brochure goes on to state:

> The American Heart Association's Speakers Bureau is a community service program designed to provide the public with the most up-to-date information on topics related to heart disease and stroke. Our speakers, with expertise in a variety of health topics, volunteer their time and knowledge to help educate the public about cardiovascular disease.

Notice in just this brief paragraph the organization states its benefits: up-to-date information, variety of topics from which to choose, credible and dedicated speakers, utility of information. In short, a true benefits statement here could be providing the community with life saving information.

Their benefits statement closes with a "call to action" statement: *"... simply read the following information and fill out the attached from."*

A small local college states that they "sponsor a Speakers Bureau as a community service to organizations in [their area]." Through their bureau they "offer a variety of well-versed speakers on numerous topics of general and current interest."

Notice that this is not a strong benefits statement but only mentions a few features. Recall in the marketing lexicon that there is a difference between "features" and "benefits." Providers of products and services become enamored by the features that they offer. But these features need to translate into benefits for the customer—benefits that ultimately add value for the customer. The customer is more interested in benefits of a product or service. Focus your language around the benefits that you provide to the constituents who use your public speaker bureau. Your features, even if superior, will be of mild interest to your customers versus the benefits that can be gained. Providing a reliable quality speaker for free is a great feature but the benefits are more important because that person is providing something that can improve the health and welfare of the audience.

LIST OF TOPICS

This element is the *raison d'etre* of the public speaker bureau. Surprisingly, it often gets only cursory study and reflection from the organization offering the service. The basic questions for the organization here are what does my organization want to communicate to its constituents or the public, and/or, what does the public want to know about, from my organization? Certainly this sounds basic and simple but it does take some thought, study, and reflection to identify useful topics to list on major promotional pieces and your web page.

The starting point should first look to the underlying purpose of the public speaker bureau. Your topics should flow from this purpose. Some of the topics can be market driven: What do these groups want to hear? Some topics could make the list for competitive reasons: identifying a topic that similar organizations do not offer which should make a good impression on the audience.

Try to stay focused with your topics. General topic listings create challenges for your speakers and risk falling short of expectations from the audience or the groups' coordinators. For example a youth health organization should not simply list "Youth and Tobacco," but may consider "Youth Onset Smoking and Prevention Strategies" or "Advertising and Marketing Effects on Youth Smoking" as topics. Conversely, your topics should not be too narrow that only a few speakers could possibly handle the topic. Esoteric topics can be discussed and negotiated at a later date when you have had a chance to discuss your services with your intended audience. For example, the local American Heart Association listed "heart transplants" as a topic and found it difficult to manage from two areas. First, the groups' coordinators, often having a higher level of education, would choose this topic for groups who had little need for the topic. Second, heart transplant surgeons and support staff were, as a practical matter, not readily available or willing to address non-descript groups on this subject. We took the topic off the brochure and used these speaker bureau volunteers for special occasions or at special events. This was a more valuable use of everyone's time and relived us from having to de-market a topic that would be challenging to deliver, however interesting it may seem to the

A list of topics, after careful evaluation from staff, volunteer speakers, and constituents for a local American Heart Association's brochure, was as follows:

List of Topics from American Heart Association, Southeastern Pennsylvania Affiliate Speakers Bureau Brochure

- Warning Signals and Actions for Heart Attack and Stroke
- Identifying Risk Factors for Heart Disease and Stroke
- Women and Heart Disease
- Nutrition and Diet
- Smoking and Heart Disease
- High Blood Pressure
- Exercise and Fitness
- Stress and Heart Disease
- Stroke Awareness
- American Heart Association Research Awareness
- The American Heart Association, what is it all about?

Notice that each topic is simply stated, making it easier for a group to choose. The topics have utility for general audiences (e.g., "identifying risk factors for heart disease and stroke") and more targeted audiences (e.g., "women and heart disease" and "stroke awareness"). The topic on research awareness was important because it is an essential, although not well understood by the public, core function of the organization. Finally, this menu of topics allows for an institutional message: 'The American Heart Association, what is it all about?" Health and human services organizations, even those that are well established, should not assume that the public has an accurate idea of what they do, beyond "I know that they do good work." Consequently, organizations should not be shy about offering a presentation to explain to the public and constituents what they are all about. This could include a brief history about the organization, its mission, some current goals and objectives, programs and services, governance, funding sources, and, of course, how individuals can help or donate to the cause.

The topical names, from our experience, should avoid *marketing fluff,* unless they are accompanied by a description. The topics should be straightforward and give the group a good idea of what will be discussed. For example, in the mid 1980s the American Cancer Society launched a national initiative educating the public about the relationships between diet and cancer. Their first educational campaign was called "Taking Control." It was an upbeat and well-produced educational package. Few requests came in from the public speaker bureau for this topic. When we suggested that the new public speaker bureau brochure change the name of this topic to simply "Your Diet and Cancer," the speaking requests came in steadily from all groups. The local division did not actually change the official name of the program and materials produced by a national office, but it did have the liberty to promote the program in a way that communicates the content of the program and, more importantly, generates requests for the program.

We noticed that within a few years there were no fewer than four health education programs in our communities with this same title, "Taking Control": a) diet and cancer, b) blood pressure reduction, c) smoking cessation, and d) alcohol addiction. While initially the title connotes an action oriented and healthy approach to the new awareness and education program, it did not serve the audience who were the decision makers on selecting topics of interest for their groups. The connotation of "Taking Control" was too abstract and the title quickly became overused.

Similarly, another title change to a cancer education program on a speakers bureau brochure went from "Colorectal Health Check" to "Detection Tests for Colon Cancer," thereby generating more requests for speakers. This is not to suggest that the official name of an education program cannot have a fun or interesting name; the point here is to effectively communicate through your general speakers bureau promotional material and web page what exactly the audience can expect to learn or hear. An American Heart Association worksite wellness program uses the creative title, "Is Your Number Up?" but also includes the parenthetical words "Blood Pressure" so employees know that they will learn something about blood pressure monitoring and control. Web pages give us the advantage of writing more copy than we have with most printed promotional pieces. Regardless, it is important to get the lead titles right so people will want to drill down the pages to learn more about a topic and make a selection based on their group's expectations.

SPEAKER REQUEST FORM

Your brochure, web page, or other external marketing piece should include a "speaker request form." This begins the process of gathering information to help meet the educational needs of your audience or customers. Initially the form is a mechanism for a *direct response* from a group saying, "Yes, we would like a speaker to come present to our group." It begins the "contracting" process that guides the *negotiations process* so your organization and the group have *aligned expectations* for what, where, when, and how you provide this educational service. Furthermore, this form begins to solicit information from the group so you can coordinate meeting the speaker request and ensure a successful educational experience for the group. Specifically, a hard copy or electronic response form should ask for:

Information Needed on Speaker Request Form

- Name of contact person who is coordinating the event
- Contact person's phone, email, and complete mailing address
- Name of group or organization requesting a speaker
- Address and exact location of where the presentation will take place (This is not always the same.)
- Type of audience (e.g., students, parents, employees, patients); encourage them to give as much information as possible here
- Number of people who will be attending (understanding that this could be an estimate)
- Desired length of presentation
- Date and time of presentation (You could also ask for an alternate choice.)
- Selected topic for presentation (You could also ask for an alternate choice.)

Exhibit 2.1 gives a sample of a request form that we designed as part of a brochure we used for the local American Heart Association public speakers bureau.

EXHIBIT 2.1

Speaker Request Form

SPEAKER REQUEST FORM

If you are interested in requesting a speaker, please read the "Important Reminders about the AHA Public Speaker Bureau" found on the back of this brochure very carefully and fill in both sides of this request form as completely and accurately as possible.

Contact Person's Name

Contact Person's Daytime Telephone Number and email address

Contact Person's Mailing Address

City, State, and Zip

[official] Name of Group or Organization

Location of Presentation (Please be specific.)

Exact Address of Presentation

Type of Audience (Students, Employers, Patients, etc.; provide profile)

Estimated Number in Audience

Desired Length of Presentation

Date and Time of Presentation (First Choice)

Date and Time of Presentation (Alternate Choice)

Topic (First Choice)

Topic (Alternate Choice)

Please return this completed form to:

AHA
SEPA Affiliate
Public Speaker Bureau
121 South Broad Street
Philadelphia, PA
Tel: 215-995-1776

You will receive, within one week, a written confirmation by mail or email (if address is provided) that your request has been received and reviewed by the public speaker bureau coordinator.

THANK YOU

PROCEDURES, POLICIES, AND CONDITIONS

The Speaker Request Form should direct your constituents on where to mail, email, or fax the request. Give complete information, including a phone number and possibly a contact person's name or title (e.g. community service coordinator, public speaker bureau coordinator, community education director). This will help them locate someone who can assist the group, especially in larger organizations. If you use a form on a web page, make sure you include a phone number, as well. While it may be self evident, you could also note that you will send a written note or call to inform the contact person that your organization has received the request. Keep in mind that our society has conditioned us to have almost immediate service. Quick service is sometimes challenging for non-profit health and human service organizations. It is healthier to at least give your customer or constituents a sense of your timeline so they are not left waiting for a quick reply or service.

You could actually start this process on the brochure or external marketing piece itself. Using the local American Heart Association as the example mentioned earlier, notice how we printed "Important Reminders about the AHA's Speakers Bureau." It read as follows:

- A calendar is mailed [to the expert speaker volunteers on the bureau] on the 15th of every month for the following month's events. Therefore, all requests must be received by the 10th of every month in order to be placed on the upcoming calendar.
- Please remember to provide us as much advance notice as possible. It takes 3–4 weeks to secure a speaker.
- We will notify you if a speaker has been secured no later than 5 working days prior to your requested date for your group's presentation.
- Please keep in mind that all of our speakers are volunteers. Therefore we may not be able to fulfill every request that is received.

Notice how this organization has set the stage and given the customer a sense of the timeline, process for recruiting speakers for their request. There is also a "no-guarantee clause," so to speak, because all of their speakers are volunteers. Establishing expectations and outlining the process, up front, goes a long way to ensure customer satisfaction—even when your organization may not be able to deliver the educational service.

Most speaker bureaus are provided *free* as a public service. If your organization provides the service for free, it is important to mention this in the benefits statement. If not free, state the conditions for your audiences.

For example, a local college stated their policy as: the College "does not normally charge a fee for its speakers, but reserves the right to negotiate a fee when necessary. However, if your organization reimburses for travel expenses or offers an honoraria, please let us know."

Your organization may want to discuss the value of setting a fee for a speaking engagement. Some non-profits find that donations or honoraria actually end up being robust compared with what they would have set for a fee. You should set a policy and ensure that your staff and speaker volunteers are familiar with how to handle an honorarium. This policy and explanation should also include how to handle conflicts of interest or appearance of conflicts of interest when money is exchanged for service donated (see page 38).

OTHER INFORMATION

Never miss an opportunity to educate your public or constituents about what your organization accomplishes. The external marketing piece invariably will have some extra space for which you can use for such a purpose. Even if space is limited, print your organization's mission statement. You could also include recent facts or accomplishments, list of services, or restate, in general terms, why your organization is a good source of information. Always remember to include your organization's website address. As long as the extra copy does not take away from the aesthetic value of the publication or detract from objective of promoting the speaker bureau, this "other information" can be a useful filler on promotional materials.

CHAPTER THREE

Recruiting Speakers for Your Speaker Bureau

Recruiting expert, effective, and reliable speakers to your bureau is probably the most important essential element to the success of this educational initiative. If there is a mismatch between a speaker and the explicit or implicit purpose and objectives of your public speaker bureau, many people will be dissatisfied, disappointed, and at times, disturbed.

What's encouraging is that you, as a coordinator, are in the best position to control how and whom you recruit to your bureau. With planning, up-front work, and discipline, you can create a *recruitment process* that brings quality speakers who can appropriately and effectively represent your organization and serve your customers.

SPEAKER CHARACTERISTICS

Generally, you should recruit speakers with the following characteristics:

Expertise: Your speakers should have the requisite knowledge, experience, and credentials to speak on a topic chosen by your audiences. There are a number of ways to initially judge a speaker's expertise. Some speakers will come by way of a reference from someone whom you know and can trust (e.g., a board member). This is a good start. Each member should be required to fill out a Speaker Profile Form (**Exhibit 3.2**). And it is useful, if not required for some presentations, for the speakers bureau coordinator to see and to have on file a curriculum vitae or resume of a prospective speaker. Ideally, someone on your staff, the board, or someone you can trust should have heard the prospective speaker give a *public* presentation. You should conduct an interview, it can even be informal, to learn more about the individual. Finally it makes sense to have someone observe the new speaker at the first few speaking engagements. You will also learn more about the individual's command of the subject from your speaker evaluation forms (see page 100).

Don't confuse interest in your organization or enthusiasm to speak with expertise and knowledge. While both are important, you are looking for an assessment of the ability of the individual to effectively impart information consistent with your organization's mission and objectives. Don't involve a speaker on your bureau, simply because the person was referred by a board member or senior staff member. While the person may be a nice guy, the bureau is reserved, in most organizations, for experts who are credible purveyors of your organization's messages. Organizations have suffered because well meaning and enthusiastic speakers have made it on the speakers bureau, yet these individuals had little knowledge and skill in spreading the organization's messages in a public venue. At best, a poor speaker adds little value to the program. At worst, the speaker could be spewing contradictory or unorthodox messages to your audiences. While groups may be understanding of an individual's desire to proselytize on a subject, they will hold you accountable for not managing the speakers bureau in a professional manner.

Knowledgeable about Your Organization: Speakers should be generally knowledgeable about the mission, objectives, and functions of your organization. While this information is usually easy to grasp and readily available, it is surprising how many speakers go out to the public without a fundamental understanding of the organization other than, "I know they do good work." Fortunately, with some basic orientation, background literature, and continued training your speakers will become experts on your organization. This is an important qualification to develop. Even the best subject matter expert, with impressive knowledge, can have a presentation tainted. If the audience senses a lack of basic information on the organization she ostensibly represents, the presenter looses credibility. For example, we witnessed at one speaking engagement the speaker from a college struggling over the reasonable question from the audience on the enrollment of the school. While the session was not a recruitment meeting, it did not reflect well on the college when a senior faculty member could not ball park the enrollment of the college. It is your responsibility, as a coordinator, to make sure you get this type of information to your speakers. It is also unwise to assume that long-time members have a grasp on this information. The basics may include information such as:

What Every Speaker Should Know About Your Organization

- Mission Statement
- Brief History of the Organization
- Current Strategic Plan or Goals
- Brief Description of Services
- Recent Performance Measures (e.g. adults served, youth educated)
- Sources of Funding (public/private/consumer)
- Percentage Distribution of Resources (e.g., education, service, research)
- Operating Budget
- Overview of Governance
- Staffing

This may seem like a lot of information to gather, but the chances are it is readily available in a few existing publications, such as annual report, service brochure, or your web pages. If not, you can develop a simple fact/briefing sheet about your organization that should take no time at all. It is unlikely that smaller agencies will have the breadth of publications that cover the information above. A good fact/briefing sheet should be comprehensive in creating a profile of the organization, but not overwhelming for the user. It should be easy to read and organized in a logical manner that helps the speaker retain or easily check information. Seasoned speakers will be grateful for a fact sheet because it allows for a quick review of the organization. Fact sheets are especially important for the complex organizations and large organizations where the speaker may be familiar with only one or a few functions of the organization.

Commitment to the Mission and Principles of the Organization: One would think that only individuals with this characteristic would self-select participation in a public speakers bureau. Not so. Experienced managers of health and human services organizations have witnessed folks who speak out, at times publicly, against the organization. This is not to say that your speakers must agree with and cannot challenge, "how you do business." However, if an individual lacks the commitment to the mission and does not embrace your strategic driving force, you should not have this individual as a member of the public speaker bureaus. If you suspect this characteristic is lacking in a current or prospective speaker, ask your supervisor or the executive director for advice on how to manage this individual. Some of this behavior will positively adjust with good orientation and training, while some "committed volunteers" or "experts" will continue to be at variance with the organization's official policies and positions. For example, a health group may experience a speaker who speaks out against the organization's healthy checkup guidelines or provides unorthodox health information. An advocacy group may have a speaker who goes overboard in partisan politics, versus talking directly about the public policies at hand affecting the mission of the organization. If not addressed, these speakers will continue to cause problems for the staff and organization. Again, continue to seek guidance from the organization's leadership on how you can minimize, neutralize, or avoid these individuals who will easily be attracted to the public speaker bureau.

Comfortable Speaking in Public or to Groups: The adage, "It's not what you say but how you say it that counts," can be true with a public speaker bureau. Even if your staff, board member, or volunteer has met the three previous characteristics, their ability to comfortably speak in front of a group is an important and valuable asset for your organization and its objectives when offering this service. As a first screen in recruiting speakers, never assume that a person has the skill to speak effectively in front of a group, regardless of her position in the organization or reputation in the field. Be direct about asking potential speakers about their comfort level in speaking in front of groups. Usually they will be up front about any reservations. Recall that speaking in front of groups consistently ranks as the leading activity that people fear. Training can improve upon their weaknesses; however, unless you have the time and resources to devote to this general, but fundamental, skill needed to deliver this service, it is better not to invite these individuals to deliver this service. This is an important assessment that needs to be handled responsibly. It is well worth the time up front to assess speakers' competencies and determine your commitment level to the respective need for training.

How do I know if someone is a good speaker? As mentioned above, this is a process. The most direct and reliable way is to hear for yourself the speaker talk in front of a group. The next reasonable measure is to ask for a recommendation from someone who will give you an honest answer. Given the nature and importance of having good speakers represent your organization, don't take this step lightly. Be direct and ask for a professional opinion from your source about the ability of the individual in question. If your source has not heard the person speak, be cautious or be willing to reject the recommendation outright. Keep in mind that you are also assessing prospective speakers' comfort level speaking in front of various audiences.

Certainly there is some room for allowing volunteers to use your public speaker bureau as professional development. But it should not be at the organization's expense. When examining one speakers bureau we discovered that several of the volunteer speakers were members of the Toastmasters Club. The field director believed that this would be an efficient way to "staff" the public speaker bureau. While these speakers were, no doubt, adept at the delivery of the message, they had very little content knowledge for the important subject at hand for the organization. After direct observation of a few programs, we saw that the presentation seemed a bit contrived to the audience. What on the surface seemed to be a clever speaker recruitment and training shortcut, turned out in the long run to be a liability for the organization at the community level.

If individuals come with good recommendations, they are on their way. Your speaker evaluation process and training program will confirm their ability and effectiveness and will refine any weaknesses.

As mentioned above, don't confuse or substitute interest in your organization or enthusiasm to speak with having the skills to actually provide this service. Your organization's mission and objectives are too important to leave to chance. Poor speaker performances will lead to a poor image of your group. In the end, it is up to you, as administrator of this program, and members of your organization to make decisions on who makes public presentations. If you are a non-profit and don't charge a fee, that may not be enough to mitigate a "poor presentation." The reality is that most audiences are not forgiving of a poor performance. Understandably, the larger and more visible the health or human service organization, the higher level of accountability demanded by your audience.

Reliability, Reliability, and Reliability: The chairman of the board of a former organization where we worked started each meeting by thanking the volunteers for attending. He would remark that 80 percent of the job is completed just by showing up. How true this will be for speakers in your bureau. Conversely, how disastrous it will be if a speaker does not show up without a good reason or is excessively late. Speakers in your bureau have to be the type of individuals and professionals you can count on to show up, on time, for a presentation. Even if they are volunteers, that will not excuse their lateness or absence by most audiences. Reliability is a must characteristic for all of your speakers.

If a speaker falls into a "high risk" category by virtue of occupation (e.g., surgeon, obstetrician, crisis intervention counselor, public safety official), discuss with this speaker the conditions and processes for canceling ahead of time. Also, warn the site coordinator from the requesting organization that the speaker may have to cancel if there is an emergency. It is best to negotiate the expectations and likely scenarios up front. If the requesting group needs an almost guarantee, go with another speaker. This could mean going with another topic. Another strategy would be to have a backup speaker ready—just in case.

One strategy to achieve this is to have the staff play a back-up role. This means that you need to train staff to present almost at a moment's notice—not an easy set of skills to develop. When hiring program managers, we insisted that they have the ability to conduct these types of presentations to diverse audiences. This is an area where you have to learn the art of good risk management.

On one occasion, a worksite cancer awareness program was scheduled for women employees of a major center city company. The agency was fortunate to have a center city nursing school's faculty and students willing to volunteer their expertise and periodically deliver cancer education programs at the worksite. On the afternoon of this program, I (first author) meet with what I thought would be senior nursing students. On the short ride to the company, I discovered that the three young ladies were sophomores and they had little public speaking experience. They prepared few notes for the presentation. We arrived at the company to find an auditorium filled with more than 300 women who were waiting to hear a presentation on Breast Self-Examination. While I knew the content and health education messages of this program quite well, I suspected that being a male who was not a physician would keep some of the women at a distance. What should I do? I asked the three nursing students to set up six information tables with the breast health models and asked for the assistance of three nurses from the company's occupational medical staff. I conducted a 15-minute didactic presentation on the nature and extent of breast cancer, the burden of the disease, as well as the promises of early detection. I then introduced the Breast Self Examination training video. After the women employees viewed the video, I invited them to go to the information tables where the nurses, including nursing students, would *demonstrate* the breast examination technique on the models and be available for questions. The next morning, a call came from the company's medial director to the executive director of our agency. The medical director of this large company thanked the agency for the excellent team deployed to teach their women breast self-examination.

Coordinating a speakers bureau will be an exercise in good risk management. As you see from this example, it paid off to have staff competent in public speaking techniques. While it may not be possible for all agencies, especially the small agencies, to have staff available in a moments notice and feel comfortable speaking in front of large groups, it is important to realize that contingency plans need to be in order before the crisis occurs. What can your agency do if the scheduled speaker does not appear or the nature of the speaking engagement changes?

RECRUITMENT IS A PROCESS

Recruiting speakers for your bureau is a planned, systematic, and ongoing process. Sound involved? In some respects it is; and it should be because it is the foundation of a quality educational service. Even with the best systems in place there is no substitute for competent, committed, and reliable speakers. There are some basic steps to follow in recruiting speakers.

Relationship Recruiting: Think of recruiting as starting a relationship between your potential speaker and your organization. This relationship, like any relationship, starts with the *first contact.* But here, the first contact should be *documented* and placed in the speaker's file (See below). It is important for the organization to know how an individual became involved in the speakers bureau; maybe a board member or a client recommended the person. If a memo or letter of recommendation was sent to you or to the executive director of the organization, simply keep this communiqué in the file. If another staff member made the recommendation, ask him/her to put something simple in writing in the form of a memo or send you an email describing the individual's credentials and ability to join the public speaker bureau. In many cases, speakers will be involved because you recruited them, in which case you document (a simple memo to the file will do) the nature of the recruitment encounter.

The encounter could be a formal meeting with the explicit purpose of recruiting the person or it could be a conversation you had at a related organizational function (e.g., annual meeting, fund raiser event). Maybe you already heard the person speak and you wish to invite her, via letter, to *consider* speaking for your organization. The important step here is to document for the organization the person's entrée onto the bureau. This becomes valuable when the day comes that you, as a coordinator, are no longer serving in this capacity and the next staff member can understand the beginning and history of each speaker's relationship with your organization. Additionally, this will help when you make periodic reviews and evaluations of your public speaker bureau. Right now you may feel that it is easy to keep a mental file of your speakers. As time moves on and staff changes occur, it is a service to the organization to get the history correct, from the beginning. The organization, and certainly the next speakers bureau coordinator, will thank you.

Recruitment Letter: You should have ready to send off a standard letter that begins or continues the recruitment process for your potential speakers. You can customize the letter, depending on the relationship of the individual to your organization and the circumstances of the contact. Additionally you will want to craft the letter according to how committed your organization is at this point in "bringing the person on" to your public speaker bureau. In other words, the speaker should get the sense of the stage of the recruitment process and know what are the next steps (e.g., interview, training, first assignment). Here are the basic objectives that we found useful in an introductory letter (**Exhibit 3.1**). The recruitment letter should:

What Should the Introductory Speaker Recruitment Letter Include?

- Formally express to the potential speaker that she is being recruited to conduct a specific function for the organization
- Briefly explain the objectives of the speakers bureau
- Convey the importance of this service for the organization
- Note why the organization is interested in this particular speaker (e.g., subject matter expertise)
- Generally outline the type of commitment for these activities
- Create enthusiasm for this activity
- Briefly note accomplishments or outcome measure to date
- Solicit more information about the speaker via the enclosed *Speaker Profile Form* (Exhibit 3.2)
- Identify the next steps (e.g., interview/meeting; training)

Recruitment Meeting: Regardless of whether or not these are paid or volunteer activities, it is important for you, as the coordinator, to conduct an interview or recruitment meeting with potential speakers. Even if the speaker has come voluntarily from the board to "help out," you have a responsibility to communicate to the speaker the purpose of the bureau and to assess the individual's competence in carrying out this important function for the organization. For example, because the board member is a friendly person or a productive fundraiser, doesn't necessarily make him suited for your organization's public speaker bureau. Does this individual possess the characteristics of a qualified speaker as explained in the section above?

EXHIBIT 3.1

Speaker Interest Recruitment Letter

Date

Stella Gray, M.D.
111 High Street
Apt. 510
Philadelphia, PA 19000

Dear Dr. Gray:

Recently, you expressed a desire to become a member of the AHA Public Speaker Bureau. We are delighted that you can volunteer your services toward the fight of reducing death and disability due to cardiovascular diseases and stroke. Last year our speakers reached 2,250 individuals in the five-county area. This year we hope to reach many more people and your contributions, given your expertise in women and hearth disease, will certainly make a difference.

Enclosed find a speaker's profile which will provide us with pertinent information regarding your area of expertise and interest, time availability, and geographic preference for delivering lectures and other speaking engagements. Once I receive your profile, I will:

- Notify you and ask any clarifying questions
- Send you information regarding the administration of our Public Speaker Bureau
- Invite you to a formal, or arrange a persona, speaker training session
- Order you a Speaker Bureau Presentation Kit that includes slides and related information to prepare you for our most common requests; slides mailed upon acceptance of speaking engagement
- Send you a current listing of speaking requests
- Send you a copy of the current public education publications catalogue and video catalogue

After reviewing these start-up materials please contact me to answer any questions. Please make sure that we have a current CV on file. Thank you for your interest in volunteering with the Speakers Bureau and I look forward to working with you.

Sincerely,
Coordinator's Name
Title/Contact Information

Generally the in-person meeting will expand upon the points already conveyed in your letter explained above. While still not observing the person "in action," you will learn a lot about the person during the recruitment meeting, even if it is somewhat informal. Here are example objectives for the meeting:

What to Cover During the Speaker Recruitment Meeting?

- Communicate the purpose and objectives of the speakers bureau and how it fits into the overall services of the organization. (The bureau is usually one of several educational services provided by the organization.)
- Communicate that the speakers bureau is a well organized service and that you are an efficient and effective coordinator
- Generally explain the promotions, service, and evaluation systems that you have in place—how do you get from request to delivery of a speaking engagement
- Solicit the subject matter expertise, the level of interest, availability and any reliability factors from the speaker
- Generally explain the support services that you provide (e.g., materials, trainings, audiovisuals, travel expenses)
- Create excitement, benefits, and personal rewards for those who participate on the speakers bureau, especially if this is a volunteer driven activity
- Assess, at this point, the comfort level and competence that the person will have with speaking engagements

Sample Questions to Develop a Profile of the Prospective Speaker

- When and why did you become involved in the organization?
- What interested you about becoming involved in our public speaker bureau?
- Have you done any public speaking before? To what types of groups? To what size audiences?
- What do you like most about public speaking? What do you like least about public speaking; any fears or concerns?
- What topics would you be most comfortable speaking about? To what types of audiences?
- What would you like to speak about that you consider new and different?
- What would you need from us to help you prepare for a speaking engagement?
- What factors could influence your availability to be a member of the speakers bureau?

These questions need not be in order and need not be delivered like a formal job interview. Your goal here is to learn more about the individual and see if she is comfortable speaking in front of groups. You need to assess how knowledgeable they are about areas of interest to your audiences, and if they are an overall good fit for the needs of your public speaker bureau. You can get this information answered in a very congenial and non-threatening manner. The interview can happen over a breakfast or lunch meeting or at the person's place of business. You may even meet with the person after another organizational event. The important point is to have enough time and take care to solicit information from the potential speaker, get to know her a little better, and communicate to her the overall purpose, objectives, and general operating procedures of this educational service. You can learn more about the individual from the important Speaker Profile Form. (**Exhibit 3.2**).

Speakers Profile Form: Each speaker should be required to complete a profile form that asks the types of information necessary for communication and match the speaker to an appropriate request. This is a refinement of some of the qualitative information that you may have received from the recruitment meeting. A good Speakers Profile Form (See example as **Exhibit 3.2**) *saves everyone time* and is a good first step to ensuring that the speaker and the audience have a good experience with your organization's educational service. Here are some essential elements that we found useful in a profile form used for recruiting our speakers:

Information to Include on a Speakers Profile Form

- Speakers name, title, and place of business
- Coordinates (phone, fax, email, preferred mailing address)
- Education, training, and credentials (tailor this for your type of organization); for example health organizations may want to see the extensive training and organization whereas a patient service organization may want to learn about a speaker's experience such as the type of organ transplant
- Areas of expertise or topics of interest to the speaker (This could be an open ended question or you may want to guide these selections with your list of priority topics for the organization.)
- Geographic areas to where the speaker is willing to travel in your service area. (Try to be specific here.)
- Available times (days of the week/weekend; times of the day)
- Types of audiences (e.g., youth, patients, parents) you are most comfortable speaking with
- Places where you are comfortable speaking (e.g., worksites, schools, clubs)

Information to Include on a Speakers Profile Form *(cont'd)*

- List other activities the person may have participated in with your organization (e.g., committees, fund raising events)
- Encourage them to send you a resume or curriculum vitae to keep on file
- Finally, encourage them to share any other pertinent personal information that would help the organization match them with the appropriate speaking engagement. For example, a cardiologist who is also a long distance swimmer makes for a more interesting presenter on the topic of the benefits of regular exercise.

EXHIBIT 3.2

Speaker Profile Form

Speaker Profile for Public Speaker Bureau

Personal Information	
Name:	Address: ☐
Title:	
Credentials:	
Telephone:	Business Address: ☐
Fax:	
E-mail address:	☐

Please check your preferred mailing address

Education—Training—Credentials	
University/School(s):	Major(s):
	Year(s) Graduated:
	Degree(s) Received:
	Certification(s):

Expertise (Topics)	

Please check all that apply (Here you can list topics that you offer and ask the speakers to note their interest and expertise)

Geographic Preference	
☐ Bucks County	☐ Philadelphia County
☐ Montgomery County	☐ Delaware County
☐ Chester County	☐ Camden County

Please check all that apply

Best Days of the Week	Times Available for Speaking Engagements
☐ Monday	☐ 9 am - 12 pm
☐ Tuesday	☐ Noon - 1 pm
☐ Wednesday	☐ 1 pm – 5 pm
☐ Thursday	☐ 5pm to 8 pm
☐ Friday	
☐ Saturday	

Please check all that apply

Audience Preference	Site Preference
☐ Youth	☐ Worksite
☐ Patients	☐ School site
☐ Seniors	☐ Healthcare Site
☐ Health Professional	☐ Community Site
☐ Community Leaders	☐ Faith-based Site

Please check all that apply

How did you come to learn about our public speakers bureau?

____

____

____

Please share your primary motivation for being a member of the speakers' bureau?

____

____

____

____

____

____

Are there any special skills you possess that may be of interest? (languages, training, etc)

____

____

____

Official Use Only:

CV attached → ☐ Yes ☐ No

Response → ☐ Call ______ (Date) ☐ Follow-up letter ______ (Date) ☐ Meeting ______ (Date)

Staff person: ______________________________

With this form you have gathered useful information about your speakers, which would have unlikely come from a casual, or even a formal, interview. This information is important to ensure a *good fit* between your audience's request for a speaker and your organization's educational objectives. Again, it will save everyone time because you will be less likely to ask a speaker to address an audience she is less comfortable with, in a place and location she would rather not be, and on a day and at a time that is really not convenient. In short, the profile is an essential element that makes your job, as a coordinator, much easier and gets the *best jobs*, so to speak, for your speakers.

Speakers' Job Description: Organizations continue to place emphasis and value on job descriptions. Human resources professionals spend increasing amounts of time with supervisors who make hires, to develop appropriate job descriptions so the organization can explain fully to a candidate what the job entails. They write the general purpose, essential duties, other duties, and qualifications needed for the job. Volunteer organizations should develop job descriptions as well. As one human resource manager once said, "Any job that's worth getting done is worth having a job description for." While most people generally understand what a speaker would do for a public speaker bureau, it is useful to develop a general job description for your speakers. **Exhibit 3.3** shows a sample job description that we developed for a local voluntary health agency's speakers bureau. Here are some important elements to consider in your speakers bureau job description:

- Overall purpose and objectives of the of the Public Speaker Bureau
- Reinforce the role of the speaker (e.g., educate, motivate, stimulate call to action)
- General guidelines, with times, on how to structure the presentation
    a. Introduce yourself
    b. General overview of the mission of the organization
    c. Topic
    d. Specific Take-home messages
    e. Questions and Answers
    f. Were and how to get more information
- Reminder of keeping presentation free of commercial content

EXHIBIT 3.3

Speaker Job Description

AHA
SEPA Affiliate

Public Speaker Bureau

JOB DESCRIPTION

All members of the American Heart Association Public Speaker Bureau volunteer their time and expertise to this educational program, which is a free service to the community. Below is a guide that should help you understand the purpose, objective, and responsibilities during your speaking engagement and to ensure quality and consistent messages delivered by the AHA.

√ Once you have notified the American Heart Association at (phone #) of your interest to fulfill a request, we will send you a **letter of confirmation**. This letter will provide you with:

- name and characteristics of the group requesting the program
- date/time
- location and place,
- contact person at the site
- audio visual and equipment requests

√ **Arrive at least 30 minutes early**. If the location/room/seating arrangement is not to your satisfaction, please speak with the contact person directly to make any suggested accommodations.

√ Seek out the coordinator or host of the program; introduce yourself and make any requests that you feel will help with the smooth running of your presentation.

√ While the group should have the AV equipment available, double check to make sure all components are working to your satisfaction.

√ Have a brief bio sheet to hand to the coordinator to assist making an appropriate introduction

√ Once you have been introduced, inform the group that **you are a volunteer speaker for the AHA, SEPA Affiliate.**

√ It is appropriate to state your profession and affiliations. Tell how you came to be a volunteer for the American Heart Association.

√ Mention to the group the mission of the American Heart Association: ***Dedicated to reduce death and disability due to cardiovascular diseases and stroke.***

√ At this point you can give a briefing on the nature and extent of the problem of cardiovascular diseases and stroke and the burden of suffering in America **(See *Heart and Stroke Facts: 2004 Statistical Supplement, and Still Number One: 2004*).**

√ Briefly discuss the **Risk Factors for CVD**, (See ***Controlling Your Risk Factors for Heart Attack.)***

√ **Begin your requested presentation and be conscious of the group's time.**

√ Try to leave time (10-15 minutes) for questions and answers. If you are unable to answer a specific question, please ask the person(s) to call the AHA's toll-free health information line at **1-800-AHA-USA1**

√ **Caveats and Reminders:**

- While the AHA encourages speakers to share their personal knowledge and experiences with the audience, please keep in mind that you are representing the Association and should refrain from conveying any patient or an organization's confidential information
- The audience needs to understand that the information you provide is strictly for educational and not therapeutic purposes.
- Speakers should avoid overtures to endorsing products, services or people, and should avoid commercial content in their presentation
- Speakers who are in private practices, (e.g., consultants, physicians, nutritionist, therapist, and other paraprofessionals) are asked **not to solicit for patients during this speaking engagement**. If people wish to further discuss your profession or services, they should be encouraged to see you after the presentation.
- Speakers are asked to abide by their profession's code of ethics.

√ **Evaluations:** All parties will have an opportunity to complete an evaluation of the program. Please complete your program evaluation soon after your speaking engagement and mail the form back to your AHA representative. (Do not send this to the group's coordinator.). We will send you a summary of all evaluations.

Thank you for sharing your time, interest, and expertise with the community and representing your local AHA!

#####

Regarding the *commercial content* issue, don't wait for this issue to surface to educate your speakers about your expectations. State up front to your speakers that they are representing your organization and their presentations need to be free of selling, endorsing, or appearing to endorse, products and services. This issue is more complicated than it appears and, at times, we recognize that there are gray areas for how brand name products and services make it into the presentations, discussions, and conversations at the sites. The first rule of thumb is to make sure that your speakers understand that they are not to "hawk wares" onsite for which they have any financial interest. If your organization allows for this under certain conditions, have these conditions spelled out and make sure both parties understand them upfront. There may be times when a well-known speaker has published a book and brings the books to the presentation for signature and sale. Certainly this can be a value added touch to the presentation. However, if the audience suspects that this was not cleared with the sponsoring organization, or if the speaker over promotes the book, there can be negative feelings from the audience toward the presentation. Speakers may inadvertently promote a product or service, or not know that it is unorthodox while representing an organization. Proper and consistent orientation and training of your speakers will ameliorate any problems in this area. You should periodically remind speakers of the need to avoid product and service promotion and *conflicts of interest* in their presentations. Drop in language that can be used in your communiqués to prevent these types of conflicts could read:

Avoidance of Conflict of Interest Statement

The [*name of agency*] appreciates your contributions to the public speaker bureau. The purpose of our public speaker bureau is [*name purpose*]. To maintain our integrity and keep the trust of [*name constituents, e.g., general public*] we ask all speakers to guard against conflicts of interest and appearances of conflicts of interest. The [*name of agency*] does not endorse any particular product, service, or individual. Please present the information in your speaking engagement in an objective and unbiased manner. Please do not promote the business of any product, service, or individual for which you have any affiliation. Thank you for cooperating with this policy. Contact [*name of agency contact*] if you have questions related to this matter.

Speaker Is Hired: After you have completed the previous steps and are satisfied with the quality and effectiveness of the speaker, you can consider this person part of the bureau. Congratulations! You just recruited a new speaker. However, this is just the beginning of the next, and important, process of monitoring her performance in an ongoing quantitative and qualitative fashion. From the beginning, you should make the speakers aware that your organization conducts systematic evaluations of speakers and the program in general. While these steps may seem formal and a lot of work, they can be completed with varying degrees of time, effort, and style. The important point here is that your organization sees that you have a circumspect screening process in place from the beginning (e.g., documented first contact, letters of correspondence, recruitment and follow-up meetings, speaker's file) and that the evaluation of your speakers will be ongoing. You should feel pleased each time you have successfully recruited or responded to a person who wants to be part of your speakers bureau. You can congratulate yourself and welcome the new and important resource you have brought to the organization. Send a formal letter of welcome to your new speakers (See **Exhibit 3.4**). Now it is time to involve them in your public speaker bureau *training.*

EXHIBIT 3.4

Successfully Recruited Speaker Welcoming Letter

Date
Roger Moore, Ph.D.
2125 South Street
Philadelphia, PA 19145
Dear Dr. Moore:

I am writing to welcome you as a volunteer to the AHA Public Speaker Bureau. I have received your profile and will process it immediately. To get you started, enclosed find a packet of information regarding the American Heart Association, educational materials available to the public, and position papers on cardiovascular disease and stroke. Beginning next month, you will receive the calendar of speaking requests. Once you have selected a speaking engagement, we will loan to you the official AHA Speaker Bureau Slide Kit. This kit will help you make presentations to the majority of audiences that request this service.

Members of the Speakers Bureau are part of our education team. Last year the Public Speaker Bureau reached 2,287 individuals from an array of organizations and groups. By educating the public on how to recognize, reduce or eliminate their risk factors for CVD and stroke, we are contributing to the AHA mission, which is to ***reduce death and disability due to cardiovascular disease and stroke.***

Please carefully review the attached outline addressing the administration of our Public Speaker Bureau. We will let you know about the next speaker bureau orientation program, or we will arrange a smaller group orientation. I am sure that you will have questions regarding the administration of the bureau, so do not hesitate to call about any matter.

Once again, welcome to the team and I look forward to working with your as we provide this important service to our communities.

Sincerely,

Coordinator's Name
Title/contact information
Enclosures: New Speaker Packet and administrative sheet

CHAPTER FOUR

Orienting and Training Your Speakers

Similar to recruiting, *training* your speakers is a *process*—an ongoing process. The training actually begins with your initial contact. Each contact, especially early on in the process, aims to communicate to speakers the overall purpose and objectives of this educational service and to explain their role and responsibilities. Speakers, regardless of their education, subject matter expertise, or comfort level as public speakers need, and in fact deserve, training from your organization.

Even within volunteer organizations, a formal training process should be in place, which provides ongoing information enrichment and public speaking skill building. Don't fall prey to the common assumptions made in some volunteer organizations that 1) The task/function is relatively simple; and 2) Any interested party can do the job and know what is expected. Training is a critical success factor that organizations should take seriously. A speakers bureau, even though it uses volunteers and is provided as a community service, should not be left to chance.

Speakers need training, skill building, and information in three general areas:

- Information on topical areas and use of educational materials
- Public speaking techniques
- Logistics on how to be a speaker for your organization

TOPICAL AND ISSUE AREAS

Each speaker will come to your organization with a wealth of personal and professional subject matter expertise; this is priceless. You can update, expand and, at times, simply refine this information with some simple training strategies.

First, you will give your speaker the basic institutional information packet. This should include the most recent annual reports about your organization, the strategic plan and priorities, and your website address, if available. The speaker doesn't need to know about the operations of the organization, per se, but as mentioned before, she needs to know the mission of the organization, recent priorities set by the board, sample activities and services, some success statistics or stories, sources of funding, and a strong statement of why the organization deserves support (public or private).

Be sure to include your speakers on the mailing list to receive the organization's newsletter. Updates on subject matters are essential tools to your speakers. Don't assume, even if they are professionals in the field that they hear and see everything. Send them copies of the latest scientific statements, white papers, position papers, chairman of the board addresses, etc. that your organization produces. Furthermore, you can send them articles that you see from professional or trade journals and articles from popular magazines and daily national newspapers. If your organization influences public policy you could send out to your speakers legislative alerts. With the advent of the Internet you can easily "pull down" such resources. This will keep your speakers well-informed, current, and better equipped to speak at their next assignment.

Educate your speakers on the instructional tools available to them, such as pamphlets, booklets, posters, videos, overheads, or computer presentations (See **Exhibit 5.1** in next chapter.)

In one instance, a certified trainer from a national training enterprise conducted a full-day staff and volunteer training session. After the morning session, the trainer came over to our executive director and noted: "The gaps that I see with the majority of the people in your group is that they do not know enough about your organization: the benefits and the services that it provides. They need a full scale orientation just on what your organization provides as a public service, before they can go out to raise awareness or funds for the organization." This example reinforced to us the need to start with the most basic information about your organization and content areas and build from there.

PUBLIC SPEAKING TECHNIQUES

When asked what people fear the most, surveys have consistently shown that people fear speaking in front of a group. Assisting your speakers to improve on their public speaking techniques is a worthwhile investment. Most health and human services organizations attract individuals who come from the educational enterprise and usually have a fair amount of teaching or speaking experience. Keep in mind, however, that there are several purposes for your speaking engagements and they will be delivered to various audiences in various settings. Only the truly gifted, well trained, and experienced speakers can adapt to the spectrum of groups needing a speaker. Providing public speaking training for your speakers will not only sharpen their existing skills but will expand their abilities to reach other groups with various messages.

A speaker who is an elementary school teacher probably has a good "podium presence" when it comes to public speaking. However, taking even professionals out of their element—let's say asking this teacher to address a group of adults at a local corporation—could cause her to "stutter step" through the presentation. Similarly, a skilled trial lawyer from your board may not fair as well speaking to local elementary school children. Having some experience in public speaking or teaching is always a good starting point for your speakers. Taking someone who has little public speaking or teaching experience onto your bureau and expecting the transformation like "My Fair Lady" may be a tall order for your organization. It will take much time and resources from your organization that you may not be able to provide. Again, this is a decision you have to make regarding speaker development. The starting point is an awareness that these issues exist.

What you can provide, however, are some "back to basics" presentation skills training and some refinement training for those who are experienced speakers. This can be provided through your formal speakers bureau training sessions (see below) and in providing resources (training videos, books, tip sheets) to your speakers. How do you know how your speakers are doing in this area? Through the evaluation processes discussed later in this manual, you will learn the strengths and weaknesses of each speaker and should see some general pattern for speaker development.

LOGISTICS TRAINING FOR YOUR SPEAKER

Having searched for and hired talented education specialists over the years, we know to look for professionals who will get the little things right. Many professionals know what is expected with the "big things" while carrying out an assignment. Our experience has shown that it is more often the "little things" that can disrupt and reduce the quality of your educational service. The "little things" invariably become the *logistics* of the educational service. If your organization can get the appropriate speaker to the right place at the right location to speak with the intended audience at the correct date and time, and use the intended educational materials on the correct audiovisual equipment in an optimum learning environment, then you are off to a good start in providing a public speakers bureau service.

At first, this treatise may seem like a mechanistic and industrial approach to a very personal encounter between your speaker and audience. The reality is that if your intended speaker does not get before your intended audience from the strongest vantage point, then things have gone wrong. One of the author's first mentors in community education frequently reminded the health educators in the department: "It takes a lot of work to be good; and to be good in this business means that you get the little things right!"

Those who have coordinated a public speaker bureau, or those of us who have done a lot of public speaking and outreach education, know the horror stories when there is a glitch in the logistics. These stories are well beyond the inevitable speaker who is late because she was caught in a little traffic. How about the times when the jacket of your video that you want to show to use as a springboard for your presentation turns out to be correct but the video inside is a *Walt Disney* tape. What if your volunteer medical speaker has canceled office hours for the morning and shows up at the beginning of the conference where he is to speak (8:30 A.M.), but he does not need to be onsite until the 2:00 P.M. concurrent workshop? What if your speaker has correctly made it to the local college, but she is not to address the college students on current women's health issues, but the children who attend the day care center on the college campus? Is this bad luck? Sometimes. More often, however, it is poor planning and poor communication. In the end, you as the coordinator are ultimately responsible to see that the logistics work well, again, even in an all-volunteer organization. Not all groups will be forgiving if things do not go smoothly. When the logistics work, your speaker is in a strong position to look good. When the speaker looks good, the audience is happy; you can feel satisfied with your service and the audience will view your organization as one that is carrying out its mission and deserves support.

As part of the speakers' orientation and training you should prepare and review a general logistics sheet (See **Exhibit 4.1**). Here are some elements to include:

What to Include in Your Speaker Logistics Sheet

- Overview of how audiences select a topic
- Process that you use to match topics to speakers
- Format for speaker requests (e.g., by letter, phone, etc.)
- Confirmation letter with necessary information about the request (who, what, where, when)
- How educational materials and teaching tools are selected and delivered to the site
- Audiovisual capacity and reservation process
- Standard format for a presentation
- How materials are returned, if applicable
- Evaluation tools and process

EXHIBIT 4.1

Logistics for Fulfilling a Speaking Request

Step I – Receiving the Request

Organizations requesting a speaker complete an online form, a form from the public speaker bureau brochure, or other promotional material.

- Review the web page and online speaker request form
- Review your promotional public speaker bureau material

Step II – Acknowledgement of Request

Once the request is received via the Web (online) form or mail back form, the Coordinator of the Public Speaker Bureau acknowledges receipt of the request to the interested organization and places the details to date on the speaker request calendar.

The summary of speaking requests calendar is mailed to members of the speaker bureau on a monthly basis, the 15th of the month. All speakers review the calendar and detailed information (topic, agency, date, geographic area, audience) and notify the Coordinator of their interest in fulfilling the engagement via phone and/or email.

Step III – Fulfilled Request

Speakers who contact the coordinator about their desire to fulfill a speaking engagement will be placed on the calendar. A letter will be generated to confirm the speakers' interest in the engagement and will carbon copy the requesting agency/organization. The confirmation letter will also provide you with samples of materials to be forwarded to the requesting site for distribution to participants It will inform the requesting organization of an evaluation form enclosed within the box and needs to be completed and returned to the coordinator.

Step IV – Preparing for Engagement

- Prior to the engagement, the speaker bureau coordinator will forward, to the site, the box of materials supporting the presentation, (including the evaluation form).
- The coordinator will be in touch with you directly to confirm your audio-visual needs and will make the necessary arrangements with requesting organization.

Step V – Follow-up

Once the engagement has been fulfilled, the speaker bureau coordinator will:

- Record receipt of the completed evaluation form and provide the speaker with a copy
  - If there is a problem identified with the speaker and/or engagement, a personal call will be made to the speaker and the issue(s) will be addressed.
- If the evaluation form is not received, the speakers bureau coordinator will:
  - Call or e-mail the contact person form the requesting agency/ organization to appeal for the completion of the evaluation form.

Step VI – Closure

Once the engagement has been fulfilled and the evaluation form received:

- The speaker will be sent a thank you letter in acknowledgment of his/her continued support along with a copy of the evaluation.
- Documentation will be placed in the speakers folder to be used in the year-end report.

FORMAL PUBLIC SPEAKER BUREAU TRAININGS

You should conduct periodic public speaker bureau trainings. They are efficient and effective ways to orient and train a new group of speakers and an opportunity to update existing speakers who have been participating in your bureau. It is a good way to diffuse new programmatic information or procedures into the bureau. It is an opportunity to convey, in a consistent manner, the most important information about your organization and the purpose of your public speaker bureau. You will basically cover in these trainings the areas discussed above a) Content area and use of educational materials; b) Public speaking techniques; and c) Logistics on how to be a speaker for your organization. You can also create camaraderie and networking opportunities among your speakers who, otherwise, would not likely meet. This gives them the opportunity to share their ideas and experiences with one another. It is a good time to motivate and energize constituents to carry out the mission of the organization.

Surprisingly, few organizations offer a good speaker bureau orientation and training session. It should not take the place of your personal meetings and recruitment process with potential speakers discussed earlier in the manual. However, it is an essential component of a high quality public speaker bureau. With a little bit of planning and organization, you can put together an orientation and training program that will have a big payoff for your speakers and the program coordinator.

Begin by planning the specific *objectives and components* of the training session. What do you need to convey to the members of your speaker bureau? What limitations, shortcomings, or concerns have they expressed? What are common themes that you have identified from meeting with these newly recruited speakers and what gaps can you see from their backgrounds that should be addressed in the formal training session. Have any speakers suggested areas for which they need improvement? The content of the training can be a combination of *organizational and subject matter information* that needs to be conveyed. It is an opportunity to boost the comfort level of your speakers who serve as educators or ambassadors for your organization.

In planning, make sure you identify key presenters who are experienced "trainers of instructors." These are special individuals and may not necessarily be the best content experts of the group. These trainers need to be individuals who can effectively address their peers and make the switch from instruction to *training*. They should have a good level of understanding of your organization and the purpose of your public speaker bureau. Depending on their function at the training session, they should have substantial "in the field" experience with speaking engagements. This establishes their creditability. If someone needs to be part of the training program for organizationally political reasons, but is really not skilled at training instructors, find a way to assign him/her to a minimal function. The training/orientation is a high level, high impact event that gives you an opportunity to get your speakers off to a good start. Don't sacrifice the opportunity to present a good training program for the interpersonal and political vagaries of the organization.

The orientation session should be both informative and motivational. Send out formal program invitations to your public speaker bureau members. This sets the stage that something important is happening, and it can generate interest in the agency's program. Participants will observe that they are part of something important—this educational service is meaningful to the mission of the organization. You can combine the training with a meal or a reception that will give the speakers time to network and become more familiar with the staff and other speakers. See **Exhibit 4.2** for a sample agenda with estimated times and annotations. We have also give you the profiles of who should present at the training. Below are some general areas to cover in a speaker training:

Subjects to Address at the Formal Public Speaker Bureau Training

- Welcome (executive director, chairman of the board, education committee chair or community relations chair) and iteration of the organization's mission statement
- Overview and purpose of today's training (speakers bureau coordinator)
- Testimonial from a benefactor of the organization (patient, client, scholarship recipient, funded researcher, etc.)
- Speaker Introductions (note how they got involved and areas of expertise/interest)
- Review Purpose and Objectives of the Public Speaker Bureau
- Review Content Areas (Draw attention to resource packet; showcase education tools and materials, and how to get further information.)
- Carefully Explain Procedures, Policies, and Logistics for speaking to groups and representing the organization.
- Testimonial from a veteran speaker (public speaking tips)
- Importance of Evaluation Process
- Question and Answers
- Wrap up and Evaluation
- Informal Reception or meal for networking

EXHIBIT 4.2

Sample Agenda for Speaker Orientation/Training

AHA
SEPA Affiliate

Public Speaker Bureau Orientation

AHA Affiliate Office
1 October 2000

AGENDA

Welcome .... Ms. Maria Martinez, Executive Director *5 Min.*

(Welcome should emphasize the mission and strategic plan of the organization and note how the work of this speaker bureau contributes to these goals.)

Introductions .... *12 Min.*

(Ask speakers to introduce themselves and note any affiliations and area(s) of expertise, and how they became involved in the AHA. Be careful that this section does not absorb too much time.)

Purpose of Orientation .... Michelle Groves, MPH, CHES, Director of Community Programs *10 Min.*

(This portion of the orientation should be handled by the lead staff person for the public speaker bureau. Define the overall purpose of the agency's Public Speaker Bureau and the objectives of the orientation)

Testimonial .... John Q. Public *10 Min.*

(Choose a constituent who has directly benefited from the public speaker bureau to give a brief testimonial on the program's impact.)

Speaker Bureau Procedures .... Michelle Groves *10 Min.*

(A lead staff person takes this part of the orientation. Carefully explain procedures, policies, and logistics for speaking to groups and representing the organization; support this presentation with several handouts, as discussed in this manual.)

Program Offerings .... Staff 20 *Min.*

(This is the heart of the training program. Review and showcase content/programs that many of the speakers will be asked to present. Depending on the types of programs and qualifications of the speakers, you will need to determine the level of detail during this section of the orientation. Draw attention to resource packet; showcase education tools and materials; note how to get further information to support their programs. Emphasize the staffs' commitment to ensuring their success in making presentations.)

Veteran Testimonial .... Veteran Speaker 5 *Min.*

(Ask a seasoned speaker to explain the benefits and rewards for participating on the agency's public speaker bureau)

Evaluation Procedures .... Staff 5 *Min.*

(Explain the importance of the agency's commitment to continuous evaluation; note that all participants: audience, site coordinator, and speaker have an opportunity to complete an evaluation. Explain the purpose of and show evaluation tools. Explain the importance of having evaluations turned in to the sponsoring agency.)

Questions and Answers Period .... Staff 10 *Min.*

(Lead staff member can facilitate this section, but allow questions to be addressed to all parties.)

Wrap-Up and Evaluation .... 5 *Min.*

(Summarize the orientation and thank participants for their commitment to the agency's mission. Ask participants to complete an evaluation to assist in planning future orientations. Make sure participants know whom to contact for what assistance; consider a staff contact sheet, if necessary. Reinforce the commitment to continuous program evaluation of the public speaker bureau.)

Reception or Meal

(Consider a reception or meal to facilitate networking among speakers)

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CHAPTER FIVE

Tools and Resources for Your Speakers

Your speakers are your most valuable assets in delivering this kind of educational service. As the coordinator you have the responsibility to equip your speakers with the information and tools that are going to satisfy your audiences. Providing educational tools and resources for your speakers may seem self-evident. However, we have observed and learned that most organizations do little in this area. Most organizations think that a public speaker bureau is a good idea for their organization. Once committed to the idea, they simply put out a call for speakers; speakers invariably step forward and off they go to speaking engagements. As one physician speaker from a community hospital's speakers bureau often exclaimed to us: "I'm off to stamp out disease and push back the frontiers of ignorance." Certainly this is an admirable effort. However, there is much work to be done to ensure quality in *What* your speakers are saying, *How* they are saying it, and *How it is perceived* by your audiences. Even those expert speakers on esoteric subject matters need resources from you—if only to support the organizational and mission related messages. This assurance continues, after a quality recruitment and training process, with providing your speakers with appropriate educational tools and information resources.

RESOURCES

As part of the speakers' training process you will want to equip your speakers with background information about the organization. As mentioned previously, this can simply be the organization's annual report, strategic plan and priorities, and planning documents specific to the educational enterprise of the organization. Furthermore you can give them information on current events, activities or initiatives within the organization. These will help the speaker show the audience that your organization is active in the community; it is on the move and things are happening. This could simply be a calendar of events printed by the organization. In larger organizations, the educational staff and speakers on the bureau may need to be reminded of the many events and activities happening within the organization. A speaker must always leave behind a good institutional message to the audience. You can't assume that your speakers are up-to-date on the many activities that your organization provides. Again, make sure they receive the organization's newsletter and are on the list for most mailings of events and activities. If your organization has a website, continue to direct your speakers to the website to find out what's happening in your organization.

Resources include *content or issue specific* information that gives speakers background information on what they will generally be speaking about to your audiences. These will vary according to your type of health and human services organization and the specific purpose and recent objectives of the speakers bureau. Furthermore, the information needs to be tailored to the expertise of your speakers. Some publications may go to all of your speakers, e.g., *Cancer Facts and Figures* for a cancer education organization. And others will be tailored to the speakers' needs, e.g., psychosocial support for one whose spouse has had open heart surgery, given to the professionals who will most likely speak on this topic. You may want to make a decision about *information that all speakers should have* and include these in the orientation and training packets or subsequent update mailings. While the Internet provides a wealth of information and ease of access for your speakers, you still need to play an *oversight role* in directing speakers to the types of information that are consistent with your organization's purpose, goals, and objectives. If you use website links or direct speakers to Internet sources, be specific about information that you are promoting as credible and appropriate for the purpose of your public speaker bureau. If your organization has a website, continue to update and monitor the information posted so you can easily direct speakers to this resource.

It is important for your speakers to know that this information is provided by your organization because this is what—and in some cases how—information needs to be disseminated. Given potentially controversial presentations on issues of public and scientific debate, policy, or individual behavior, you want your speakers equipped with what your organization may view as *The Source* on the topic or issue. While you may be tentative about outright censorship of your speakers who at times may give their professional opinion on a topic or issue, you need to be clear about what the organization has said, how it interprets an issue, if at all, and what public policies it is likely to support. This information comes from your content or issue specific publications, positions, or policies.

You should send to your speakers the educational and informational materials that you intend to be *distributed* to your audiences before or after presentations. While these may be written in lay terms for a general audience, your subject matter expert speakers should familiarize themselves with these materials. This is another way to ensure that your speakers' presentation is generally congruent with your organization's printed messages. It can be embarrassing when a speaker is not aware of the material in an agency's official publications that are used as handouts in a presentation.

Here are some examples of *content or issue specific materials:*

Equip your speakers with these types of publications/resources

- facts and figures publication (health, education, or welfare data for your service area)
- health check-up guidelines recommended by your organization
- scientific statements on various topics
- articles in peer reviewed journals
- articles written by your staff, board, or consultants
- government reports that your organization supports
- opinion surveys that your organization recognizes as valid
- needs assessment reports (private or governmental)
- history of a topic or issue
- published editorials from experts that your organization supports
- proposed legislation that your organization would support
- public policies or regulations that you support or want to change
- white papers from your organization

Naturally, educational organizations produce and keep on file a lot of publications and resources. You do not want to inundate your speakers with so much information that it works against them presenting a cogent message. Decide on the basic information that you think that they need, then simply produce a list of resources with titles and brief descriptions of materials that they request, when needed (**Exhibit 5.1**). You could direct them to your web page, if available. Your job is to communicate what support is available to them in the event that they need more information. As a health or human services organization, information is usually your strategic driving force. Make sure the basic information is made available to your speakers!

EDUCATIONAL TOOLS

Today's audiences, especially youth, are increasingly used to energetic, interesting, and powerful presentations. While your service as a public speaker bureau may not be one of "entertainment," groups have become less than enamored by the perfunctory "talking heads speakers." Even with some basic audiovisuals, you can improve the effectiveness of your speakers' presentations. As a coordinator, your job is to select, screen (if chosen by the speakers), and monitor the use of educational tools. Make an investment, even if small at first, in this area. Spend time thinking about, testing, and evaluating what teaching tools are effective for your educational messages and audiences. Consider what tools are durable or will travel well. Then get the word out and train your speakers on the proper use of these tools. Your type of organization and audiences determine what is best to use as a teaching tool. *Here are some ideas and tips:*

Overhead Transparencies: These are probably the most popular teaching tool. They are easy and inexpensive to make, easy to transport, and easy to use. Color transparencies have become easy to make with the advent of the personal computer, software packages, color printers and copiers.

Slides: The hallmark of a solid academic presentation used to be the 35mm color slide and projector. The cost of producing slides has come down considerably, again with the introduction of the personal computer. Given the appropriate conditions in your instructional setting, slides are still a powerful medium to support a presentation. Their transport and use take more care than the overhead transparencies. With a little experience, most presenters can handle using a slide presentation. Don't underestimate, however, the need for training on how best to use this medium before speakers use this teaching tool in the field.

Computer Presentation: Increasingly becoming the standard as a teaching tool, the computer "slide show" presentation popularized by the Microsoft *PowerPoint* software package, is a powerful teaching aid. Graphics, images, photos, various typefaces, a myriad of colors, and even sound, quite simply can make any point in an educational program *powerful!* This tool takes more training in the production and use of the slide show than the two mentioned above. Once you have become accustomed to its use, it's hard to go back to using the other two media. Again, training is important in how to use this tool that truly tailors to your needs as a presenter. The point here is to start the training process in the organization with someone who will take the lead. While it won't happen overnight, general training in using this tool needs to happen.

Videos: can be effective to use during a presentation. Generally the video should be brief (on average 12 minutes) and care should be given to show the video at the appropriate time within the presentation. Some speakers may use a video as a springboard to their presentation. Others may use the video as a closer before the question and answer period. We have used a video at the end of a presentation that is literally one minute in length. This video, with the strategic placement in the program, provides a powerful enhancement to our message. Sometimes they can be used to make a dramatic point; communicating information that shear words alone may not convey. For example, a public speaker bureau for a domestic violence agency shows a video that has an actual 911 call where a child has called for help because his mother was being beaten by his stepfather. This makes for a powerful part of the presentation and leaves an indelible message for the agency. Videos are usually inexpensive, a good quality medium, easy to transport or mail, and easy to manage with the correct equipment (video cassette player and monitor). Larger audiences will require specialized equipment to project to a large screen. Be mindful that the size of your audience can influence the decision on the medium.

Posters, Charts, Photos: With some creativity, these make easy visuals to enhance presentations. Simply place them on an easel or situate them around the room, if you have a small enough audience. Laminating these improves the ease of use, transport, and durability. Nutrition education programs may use a poster of the government's food pyramid. Physical activity posters often display comparative data on the number of calories burned during common physical activities and exercise routines. Human service agencies can display pictures of clients served or visible signs of the impact that their work has on their clients. A presentation on the history of cigarette advertisement themes titled: "Decades of Deception" uses original cigarette ads laminated on cardboard.

Models and other Props: Often overlooked as teaching tools for a speakers bureau, these items can really help a presentation come alive. Most people equate these items with the "Mr. Science" presentations. There are a myriad of models and props that would naturally work with a presentation. For example, presenters on youth deterrence to tobacco products use a *Mr. Gross Mouth* to show what smoking and chewing tobacco does to the oral cavity. The American Heart Association speakers will pass around a five-pound model of fat during the presentations on diet, nutrition, and physical activity. Senior centers may pass around items hand made by clients who are proud of their newfound craft. And cute or exotic animals can help educate audiences of the importance of environmental protection and preservation areas.

You should prepare a *speakers educational tools list,* which includes the items (videos, slides, overheads, charts, etc.) available to your speakers. (See a sample in **Exhibit 5.1**) Things to include on each description are:

Descriptors for Educational Tools List

- complete title of medium
- brief but accurate description of the tool
- year of production
- running time (if a video or audio tape)
- other descriptors for models (e.g., weight, height, etc.)
- intended audience(s)

Also include on the list the *procedures* used to reserve, transport, and return the educational tools. Make a statement on the list that the materials are the property of the organization and should be returned as soon as possible so other speakers can use them.

You may have a situation where a person or a group of persons are conducting frequent presentations and can be entrusted to keep the educational tool on short-term or long-term loan. This can be an efficient way of using and assigning the educational tool. As the coordinator you will need to make this judgment. If you do make a "long term loan" to speakers, make sure it is documented for the organization; this is good stewardship. If the educational tool was purchased as part of special funding or grant, knowing where your materials are located is important. As an example, we were faced with accounting for a teaching tool that was given to our agency as part of a small grant from the state health department. Officials called our agency some five years after the program began to return the materials. We were surprised, given that the information offered via the teaching tool was clearly outdated. This did not matter; we had to conduct the due diligence in getting the materials back to the health department. It turned out that these materials were sent to worksites on "long-term loan" but there were not good records on where. We were chagrined to report that we could not locate the tools that were officially the property of the state health department.

Speakers may request reimbursement for materials that they develop to tailor their presentations. Try to have some preliminary discussions or, better yet, set policies, ahead of time on reimbursement and procedures before you are faced with these case-by-case decisions. If a public speaker bureau is large and active, we have found that these requests will invariably surface. We have known speakers to request reimbursement for slides that they produced or materials that they bought to complement their presentations. While they see these contributions as incidental and well intended, you can imagine the problems that can occur in trying to manage an educational tools cottage industry.

EXHIBIT 5.1

Sample Educational Tools List for Speakers

Tobacco Control Resources and Teaching Tools

Background Resources: This library of tobacco resources offers speakers a comprehensive body of research produced since 1992. In addition to study findings, it provides a historical bibliography of leading tobacco authorities.

Title	Description	Type and Language	Audience
No. 15: Those Who Continue To Smoke: Is Achieving Abstinence Harder and Do We Need to Change our Interventions?	This is the last in the series of Smoking and Tobacco Control Monographs begun in 1991. The reports in the monograph describe a variety of approaches that will be necessary to help more smokers quit. 4/2003	Book, Research/Statistics English	Health Professionals
No. 14: Changing Adolescent Smoking Prevalence	This monograph is the first major update of adolescent smoking behavior since the reports of the Surgeon General and the Institute of Medicine in 1994. It reports some progress toward reducing tobacco use among adolescents but also highlights areas in which more efforts are needed. 11/2001	Book, Research/Statistics English	Health Professionals
No. 13: Risk Associated with Smoking Cigarettes with Low-Machine Measured Yields of Tar and Nicotine	This report reviews evidence on the Federal Trade Commission's methods for measuring tar and nicotine yields in cigarettes and the disease risks of machine-measured low-tar cigarettes. 11/2001	Book, Research/Statistics English	Health Professionals
No. 12: Population Based Smoking Cessation	This publication provides the proceedings of a conference on "What Works to Influence Cessation in the General Population" held in June 1998. It is designed for health professionals. 11/2000	Book, Research/Statistics English	Health Professionals

Title	Description	Type and Language	Audience
No. 11: State and Local Legislative Action to Reduce Tobacco Use	This Smoking Tobacco and Cancer Program monograph identifies all known local tobacco control ordinances in the United States that have one or more of the following provisions: clean indoor air, youth access, or restrictions on tobacco advertising and promotion. 8/2000	Book, Research/Statistics English	Health Professionals
No. 10: Health Effects of Exposure to Environment Tobacco Smoke	This report by the State of California provides a broad review of environmental tobacco smoke (ETS) covering the major health endpoints potentially associated with ETS exposure. This publication is not available in hard copy. 8/1999	Book, Research/Statistics English	Health Professionals
No. 9: Cigars: Health Effects and Trends	This monograph is the work of over 50 scientists and is a complete review of what is known about cigar smoking. The conclusions represent the best scientific judgment, of not only NCI, but also the larger scientific community. 2/1998	Book, Research/Statistics English	Health Professionals
No. 2: Smokeless Tobacco or Health: An International Perspective	This book describes the epidemiology, clinical and pathological effects, carcinogenesis, nicotine effects and addiction, prevention, cessation, and policy research findings in the area of smokeless tobacco. This publication is not available in hard copy. 9/1992	Book, Research/Statistics English	Health Professionals
Special Issue of the American Journal of Health Behavior on Youth Tobacco Cessation	The special issue of the *American Journal of Health Behavior* on youth tobacco cessation provides articles on the following topics: overview of the Youth Tobacco Cessation Collaborative, comparison of review methods for tobacco control, application of better practices framework for youth tobacco cessation, recommendations for developing, implementing and evaluating youth tobacco cessation programs, and research methodology issues and research gaps. This special journal issues is appropriate for researcher, scientists, and tobacco control practitioners. 9/2003	Book, Research/Statistics English	Health Professionals
For descriptions of Monographs 3–8 log on to: http://cancercontrol.cancer.gov/tcrb/monographs/			

Patient Education Materials Title	Description	Type and Language	Audience
Clearing the Air: Quit Smoking Today	This booklet is designed to help smokers get ready to quit. It also describes tools that can help smokers stop smoking and the problems to expect when they quit. 9/2003	8 x 11 Booklet English	General Public
Guía Para dejar de Fumar—No lo deje para mañana, deje de fumar hoy (Guide to Quitting Smoking)	This full-color, 36-page, self-help booklet on smoking cessation is specifically for Spanish-speaking audiences. This guide gives tips on how to quit smoking and includes an extensive section on pharmacological aids for nicotine addiction. 1/2002	8½ x 11 booklet Spanish	General Public
Spit Tobacco: A Guide for Quitting	Published by the National Institute of Dental and Craniofacial Research and NCI, provides information on how to quit using smokeless tobacco. 6/2000	Booklet English	General Public
Dangerous Game: The Truth about Spit Tobacco	This booklet encourages students who use spit tobacco to develop a plan to quit and highlights the oral health effects of spit tobacco use, including gum recession, oral lesions, and oral cancer. 8/1995	Booklet English	General Public
Chew or Snuff Is Real Bad Stuff	Designed for seventh and eighth graders, describes the health and social effects of using smokeless tobacco products. 6/1993	Brochure	Youth General Public

Resources for Clinicians—All of the above publications as well as the list below:

Title	Description	Type and Language	Audience
Treating Tobacco Use and Dependence: Quick Reference Guide for Clinicians	Designed for health care providers, is a distilled version of the Clinical Practice Guideline on Treating Tobacco Use and Dependence. It provides summary points for ready reference on a day-to-day basis. 10/2000	Booklet English	Health Professional
Treating Tobacco Use and Dependence: Clinical Practice Guideline	This book is an updated version of the 1996 Smoking Cessation Clinical Practice Guideline. It includes new clinical treatments for tobacco dependence. It is designed for clinicians. A summary of this publication is available on the Surgeon General's Web site at http://www.surgeongeneral.gov/tobacco/smokesum.htm. 6/2000	Booklet English	Health Professional

EQUIPMENT

Audiovisual media necessitate having the appropriate equipment to showcase these educational tools. This equipment must be readily available, set up, and have knowledgeable people on hand to operate or trouble shoot problems, and to care for the equipment to ensure long-term use. When it comes to audiovisuals and equipment, a healthy appreciation for one of Murphy's Laws (What can go wrong, will go wrong.) should motivate you as a coordinator and your speakers to plan ahead, pay attention to detail, and be prepared for almost anything.

We have learned that well-meaning individuals at the site of the presentation try to assist in this area but usually make things worse. For example, those of us who have conducted many speaking engagements remember the horror when the slide carousel was not turning in a projector. To the rescue came a well meaning "helper" who disengaged your slide tray from the projector, took a look at the carousel only to have all of the slides fall out of the tray—not much help here!

It helps for you, as the coordinator, to become familiar with and adept at using equipment necessary for the teaching tools that you and your speakers will be using. Even if you are using simple posters and graphs for a display, you will want to know the finer points of setting up an easel. Some easels are large and heavy—others are portable made of special lightweight material and the tripod legs retract making set up a cinch—if you know how to negotiate this specialty equipment. From sophisticated computer audiovisuals to the simple easels there are many lessons before you become adept as the ad hoc "audiovisual coordinator." Even if there is an on-site person responsible for this equipment, it pays to have a *good working knowledge* of the equipment and its capabilities. While some of these issues are beyond your control, you should develop a preparation, prevention, and risk averse mind set if you will use any audiovisual support.

If you require the site to have the audiovisual equipment on hand, you must be very specific about this request. This is an important part of the speaking engagement *confirmation process,* which we will discuss later in the manual. Your organization may already own some equipment, which you will be bringing to the speaking engagement. You need to be specific about what ancillary materials you will need (e.g., access to an outlet, extension chord, screen). Don't assume anything about the location where your speaker will be giving a presentation. Spell out exactly what you need. Quite often we have found a slide projector set up for the guest speaker, but no screen was in sight. Even educational institutions need to be told what your needs are. One evening, one of the authors was scheduled to give a slide presentation to a large city university class. It turned out that when the one light switch went off, the room turned completely to dark. The professor was asked how other presentations worked in her class. She explained that the light generated from the overhead was enough for the students to take notes in the classroom when she lectured. The guest speaker was using a slide projector, not an overhead. With the overhead fluorescent lights on there was too much light to see the color slides. With the lights off the room was pitch dark. The speaker went with the lights off, left the door ajar to attract some light from the hallway, and hoped that the students did not fall asleep. Train your guest speakers in the bureau to be prepared for anything and be creative about improvising.

Professional speakers actually include a "technical rider" (**Exhibit 5.2**) in their confirmation packet. This gives the site coordinator instructions on what to set up and how the equipment will be used for the presentation. Technical riders are useful because they take a proactive approach to ensuring that no snafus will occur during the presentation. The challenges of public speaking are great, as it is, why risk complications with areas that you can attempt to control?

Most people will appreciate the technical rider, even the experienced audio-visual coordinator. No direction is too simple or obvious not to include. For example, speakers today can ask for a small bottle of *unopened* water, in case they feel parched. This replaces the glass of water on the side table, which invariably manages to be knocked over just before the speaker takes the podium. Or the water becomes an afterthought once the program has started. The obligatory glass of water gets escorted to the podium, just as the speaker is gaining momentum. Well-meaning assistance can become major distractions.

Technical riders should be simple and direct. State your ideal needs and improvise later, rather than starting from improvisation. Don't be shy about providing the technical rider. Explain to the program coordinator that given your years of experience at the podium, you have identified the variables that move toward ensuring the presentation happens without incident. Be careful when being overly descriptive in supporting your well-intended technical terms for equipment. One author asked for a 35mm projector for a speaking engagement but heard back from the sponsoring agency that they did not have that equipment on site. When the date came for the speaking engagement the author dragged the slide projector with him only to discover that once the site coordinator saw the piece of equipment she said, "Oh, we have one of those." Sometimes even securing equipment from the AV support staff can be a challenge. One author asked for a 35mm slide projector from the AV office of a university. The technician noted that they only had the equipment listed on the reservation sheet. Not surprising, their AV reservation sheet listed the "35mm slide projector." What are the technical terms, informal terms, and brand names for the equipment? Be prepared for anything when it comes to securing your AV needs.

You should consider at what point your organization invests in good audiovisual equipment to take on site. If your organization provides a high volume of speaking engagements, it may be worth getting the appropriate equipment for your program. An experienced speaker who gave many presentations throughout the year shared that he would ask the site coordinator to have a slide projector available and he would always carry and extra one in the trunk of his car—just in case!

To put your well-prepared audiovisuals to use, you need the right equipment. These are the little things that can make or break your presentations. It takes discipline to make sure that the proper equipment is there for your speakers. Again, any time devoted to this area is well worth it. Today's AVs are becoming more sophisticated. Even the most experienced presenter familiar with their AV equipment knows that rarely is the set up a "plug and play" process.

EXHIBIT 5.2

Speaker's Technical Rider

TECHNICAL RIDER

1. Topic: *Decades of Deception*:
2. Estimated time: 75 minutes with 5-minute break
3. Target Audience: Young adult to adult
4. Expected Attendance: Classroom to auditorium size
5. Seating: preferably theatre style
6. Large projection screen in front and center of audience; ensure that screen is the appropriate size for the size of the audience and room.
7. Podium: The podium should be positioned to one side of the screen. The podium can be a bit more distant to the side than usual. This presentation is effective when the audience stays focused on the slide generated images on the screen; the speaker serves as commentator and will often direct the audience to focus on components of the advertisements using a laser pointer.
8. Projector: standard 35 mm slide carousel projector.
   - Remote control
   - Auto Focus
   - Extra projector bulb
   - Extra 60-80 slide tray
9. Laser Pointer
10. To make for an effective presentation, it is essential that I am able to advance and change the slides. Please ensure the proper technical set up for this, such as a remote slide changer, switch from the podium, or supplying an extension cord for the slide changer to comfortably reach the podium.
11. Lighting: Ideally the lights can be dimmed for the audience to see the images on the screen. A focused light at the podium will assist in working with notes.
12. Depending on the time of day, a plan should be made to temper the light coming in from any uncovered windows.
13. Microphone: An affixed microphone or a lavaliere microphone is preferred. A hand held microphone is less useful.
14. Bottle of water: Given the length of the speaking engagement, a small-unopened bottle of water would be helpful to the speaker.

CHAPTER SIX

Publicizing Your Public Speaker Bureau

Similar to any service provided by your organization you should have a publicity or marketing plan to promote your public speaker bureau. You should meet with the individuals in your organization who are responsible for external relations or marketing to determine the strategies your organization will use to publicize the availability of this service. If your organization has several services, then you will have to vie for time on your co-workers' agenda. The public speaker bureau may not be the top services to promote. However, some level of publicity should be dedicated, if your organization has chosen to devote some time and resources to this service. If you are responsible for the promotion of the program, as the coordinator, or if you also work within the external relations/marketing department of your organization, then you will be familiar with the traditional ways to publicize a service such as this public speaker bureau.

NEWS RELEASES

Anyone who is on staff with responsibilities for external relations will know how to craft a *news release* to get publicity for your public speaker bureau (newspapers, radio, cable TV). Your job is to provide this person with *current information* about your offerings and how one would contact you to request a speaker. Keep in mind that information about a speakers bureau is usually not newsworthy in itself, but falls under the rubric of "community services." News outlets are happy to run information about your service because this is "news that the people can use." Local weekly newspapers and cable television public access stations are most receptive to this type of information. Radio stations are becoming more receptive to this information under the "in the community interest" angle. Again, work with the professionals in your agency who handle this function. Periodically remind them to run a release for this service. Note anything new or fresh that could generate greater "placement" in the news. For example there may be an issue that has risen to the political agenda or is gaining interest in the media. Your organization can capitalize on this by offering a speaker to groups who can hear an authority on the hot topic. Ask the external relations staff if you can check the copy of the release for programmatic accuracy on the service that you provide. Good public relations practice is to have the content experts proofread copy for programmatic accuracy. If the staff in your PR department do not use this protocol, you have to delicately suggest that you review the copy so the agency is not left responding to *inaccurate expectations* from the public. Approach this request from the standpoint of good customer service versus "checking someone's work." Reinforce to these co-workers that you are not necessarily checking for style—you know that is their job—but think that it is important to check to see how the program is presented. Again, most external relations professionals should not take umbrage with your request to check the release for accuracy. If the office does not have you review the material ahead of time, be sure to get a copy of the printed release and share any areas of concern.

Similar to most news releases, the news release should include some basic information about the service. However, don't assume that everyone knows the purpose of a "speakers bureau" and how it functions. Devote some copy to explain this. Below are areas to consider in your release. (See **Exhibit 6.1** for news release format.)

Cover This Material in Your Public Speaker Bureau News Release

- Describe the public speaker bureau service
- Who can benefit from the service
- Explain some benefits to the groups for having a speaker
- Describe something special or unique about your programs
- Identify the sponsoring organization
- Establish credibility as a provider of this service
- Explain any terms or conditions, e.g. Is the service free or is there a charge?
- Give a call to action statement
- Give a contact name/phone or email that is responsive to such calls

EXHIBIT 6.1

Development of a News Release

1. **Use company letterhead (8½ x 11)**
2. **Type content using easy to read font**
3. **Double-space; use ragged right**
4. **Margins 20/80 so editors can make copy reading changes**
5. **Try to not exceed one page limit**
6. **Avoid jargon**
7. **Proof read; proof read!**

For more information:
Contact Person:
Phone Number:

FOR IMMEDIATE RELEASE: (Town, State) Most news releases should read immediate release unless there is an embargo on the information. This generally occurs when you want to apprise editors but time the actual release of the information. Timing is everything. For local paper and small venues, two to four weeks prior to the event is best. In fairness to your speakers, four to six weeks would be ideal.

Titles are often used to alert the editor of the content and may not necessarily be used or "picked-up." Content for the news release ought to be summarized in the first two paragraphs. The main components of this section should answer who, what, when, where, why. Quotes are good but make sure they come from a credible source. While providing facts to support your point is necessary, too many fact and figures confuse the reader. A good rule of thumb is to limit your take-home message to three points, thus keeping things short and focused. If your release is longer than one page, the following page should begin with the Title/Page 2.

Once you have completed your content, check your spelling, punctuation, and capitalization. Confirm your facts and dates. Prior to faxing or sending the release, notify in-house staff of the release and provide a simple protocol for calls received in your absence. Make sure that the organization's leadership is notified of any release, as they may be called upon, when in the field, to comment.

Always try to follow-up with editors and or staff to (a) confirm that the release has been received (b) inquire when or if they intend to use it. If your release is printed, it never hurts to provide the editor with feedback. Letting them know how they have helped the cause, your organization and the community at-large will go along way in building rapport.

If the release extends to more than a single page, write "more" at the bottom of the page. At the end of the release use "30" or ### at the bottom of the page.

HOMEPAGE ON THE WORLD WIDE WEB

If your company has a homepage on the web, you have an added avenue in which to publicize your public speaker bureau. Just a few years ago, this option did not exist. Today organizations are making great use of their homepage to publicize services. Think of the amount of advertising dollars that were needed to "reach" so many people with your messages.

You may start simply by having a brief description of your public speaker bureau service and a phone number, email or address to make a request. Some organizations are already making great use of their homepage by allowing people to fill out a "request form" online. Generally you can include all the information that you would use in your brochure or other promotional pieces explained in chapter two of this manual, with some added bells and whistles if your homepage operator and finances allow. Some organizations list all of their speakers and in-depth descriptions of the topics offered.

Work with your web page designer to get an interesting and effective presentation of this educational service. Keep in mind the types of groups who are most likely to connect with you online; they could be very different from the groups that need to be reached but, for whatever reasons, do not access the website. Those groups who do not connect to the web will need to be reached in other ways, such as direct mail or in-person contacts. In marketing lexicon, we are encouraged to "lead our customers" in behaviors that they otherwise would not attempt. However, we must be circumspect about not reaching groups with our message. In time, access to websites will be commonplace, but in the meantime we need to consider how all groups receive information, if we wish to connect with them.

Before getting material about your speakers bureau to your web designer, it is important to understand the philosophy, purpose, and communications style of your organization's website. This will impact how your information will be presented. For example, some organizations see their website as a marketing tool and are very clear about communicating with this tone, versus using detailed and technical information about programs and services. There could be some tension between how the marketing staff would like to promote the public speaker bureau and how the program staff would promote the service. Our advice is to ask each side to give some latitude in negotiating the copy that appears on the organization's website. Most marketing and communications staff are adept at communicating with their various audiences and constituents. Listen patiently to their approach. Program staff can lend assistance in making sure the service promoted is accurate. Remind the marketing and communications staff that they do not have to deliver the service—you do! Therefore, you should be very vocal about the accuracy of the services provided. Working back, you must ask yourself, "Ccan we deliver the services described in the manner described and under any terms and conditions noted?" Marketing fluff needs to pass the *ability to deliver* litmus test. Marketing professionals will usually understand this concern and work with you to find the proper verbiage to both interest your audiences and accurately describe what you can deliver via the public speaker bureau.

DIRECT MAIL

Use your program brochure or a simple flyer or poster to create interest in your public speaker bureau. Think carefully about the audiences that you want to reach and where you would like to make a presentation (e.g., schools, workplaces, women's groups). Find out from your organization which mailing lists are available. You can use your current constituents and work from there. You may be surprised how many mailing or email lists are available through the normal course of doing business in your organization. Don't confuse indiscriminate mass mailing lists with targeted lists of groups or organizations that may be very receptive to your public speaker bureau service. A simple cover letter and your brochure is all it takes to make people and groups aware of your public speaker bureau. If they are not the intended user of the service, they can be directed to pass the offer along. Use the principles of good direct mail campaigns. Also, consider piggy backing with other mailings that may be going out from your organization. Targeting the right mailing lists is still an effective and efficient way to reach people about your services. Dollar for dollar, direct mail is publicity money well spent.

Keep These Direct Mail Principles in Mind When You Mail Your Promotional Materials

- Match your service to the appropriate target audience(s)
- Highlight the benefits to the user, not simply the features
- Create seasonal or event specific tie ins to your service
- Note the ease of use or special terms
- Answer the "What's the deal?" question for the customer
- Include a call to action!

"WHAT ELSE?" MARKETING

People come in contact with your organization for several reasons. Always be alert to tell people *what else* you can offer them. Have your information available while other services or events are taking place. The "What else?" marketing strategy asks constituents or customers "What else can be done for them after you have meet the present need?" For example, health organizations may take speakers bureau brochures at worksite health fairs where employees can consider the service for other groups to which they are affiliated. Human services organizations can bring the public speaker brochure to fund raising events in the community. The League of Women Voters may leave their speakers bureau brochure at a polling place. A natural history museum may give a speakers bureau brochure to the teacher who brought a class into the museum.

Make sure your staff is always equipped with brochures or other communications that can promote your speakers bureau, even when they are engaging the public in other activities. As the coordinator, don't be caught without brochures to offer to those with whom you come in contact with in your other responsibilities. Even in incidental or social conversation with people you interact with during the workday, e.g., on public transportation, you can leave behind your organization's public speaker bureau brochure. People are genuinely interested in the work of health and human services organizations. After you explain what you do for your organization, consider leaving with these folks your public speaker bureau brochures. Our practice was to always have some brochures in our briefcase for this purpose.

SPEAKERS' MARKETING

While it may seem obvious, remind your speakers that they are the best marketing tool for creating interest in this service. Make sure they have brochures or other materials that promote the speakers bureau. Some organizations have made up generic business service cards that the speakers can leave behind to promote the service. Person to person marketing is proven to have the highest impact in many services and this holds true for an organization's speakers bureau. With a little bit of training, reminding, and getting over any shyness, your speakers should be able to generate enough interest to keep the speakers bureau busy. Anyone associated with your organization should have a working knowledge of what the speakers bureau does and how individuals or groups can access the service. Again, getting a brochure, a simple fact sheet, or the program descriptives in their hands will go a long way to expand your marketing force.

CHAPTER SEVEN

Coordinating Requests from Your Constituents

PROCESSING YOUR SPEAKER BUREAU REQUESTS

Information about requests for a speaker will flow to you from several directions and in diverse format (e.g., responses from brochure, unsolicited requests through the mail, email, phone, in person). Ideally you have set up systems and communications channels that give you the information you need to begin meeting the customers' needs. As we have learned earlier in this manual, knowing that a request exists for a speaker is just the beginning.

You need to set up a system to receive and continue to retrieve reliable and accurate information that meets your customers' speaker request, when they want it, where they want it and under quality conditions. Much of this information will come from your well-designed speakers request form (print or webpage). Someone needs to be responsible for reviewing all information related to a request (intake coordinator) so you can begin the speaker recruitment process. This may be you, while serving as the speakers bureau coordinator, or it may be support staff personnel. If you rely on others to intake requests, make sure they are properly trained in all aspects of the program. The intake function on the surface can be viewed as a straightforward, simple task. Don't take this for granted. And don't expect to involve yourself in the process just before the speaking engagement expecting everything to run smoothly. As the coordinator, you have the ultimate responsibility for these programs.

A speaker request intake form can help you manage the process from request, recruitment of speaker, confirmation, logistics, materials, and evaluation (See sample Speakers Request Intake Form **Exhibit 7.1**). While this may seem like too much detail, years of experience have shown that gathering this type of information and having a tracking system up front, increases the chances of your groups and speakers having a positive educational experience with your organization.

Having received a request, the objective at this stage is to begin to gather and probe for more information from the group's request. Make no assumptions. If you have a question or doubt about any of the information received thus far, place a call to that group's contact person. Your objective here is to define as clearly as possible the needs of the group. Learn all that you can about the request so you can successfully recruit the best speaker for their educational program.

INTERACTION WITH THE GROUP'S CONTACT/COORDINATOR

As mentioned above, after you receive a speakers bureau request from a group, you will need to review the information and fill in any gaps to begin meeting the group's need. You will be working, most likely, with a group's contact/coordinator. After sending your organization a request, you can expect the group's coordinator to contact you soon thereafter. We were always surprised at how quickly the coordinators contacted our organizations to follow up on their requests. If the coordinator did not have a sense that the staff was attentive to the request, a sense of anxiety and dissatisfaction would set in. As most of you have experienced, when customers get dissatisfied they don't waste time calling for the director of a department or the executive director of the agency. Such early missed expectations are unnecessary. These feelings can be avoided by following the process and tips in this section of the book.

The requesting groups' coordinators generally have the following questions soon after they have submitted a request for a speaker

- Did the organization receive our request for a speaker?
- Who will be coming to speak to our group and what will this person be speaking about?
- When will the speaker be coming; can I start publicizing the program?
- What else, if anything, do I need to do to make this program happen?

EXHIBIT 7.1

Speaker Request Intake Form

Date of Request ____________ Person Completing Form ________________

Mode of Request: ___ website ___ brochure ___ phone ___ email ___ letter ___ staff

other/explain ____

Contact Person's Name __________________ Organization ________________

Daytime Telephone Number and Email Address __________________________

Contact Person's Mailing Address ______________________________________

____

Location of Presentation (Exact Address of Presentation) _______________________

____

Place of Presentation ____

Type of Audience ____

Estimated # in Audience ___________

Topic (First Choice) __________________(Alternate Choice) _______________

Desired Length ____

Date/Time of Presentation (First Choice) ________________________________

(Alternate Choice) ____

Part of a larger program? _______ Explain ______________________________

____

____

How did the Group Here about the Public Speaker Bureau? ______ Direct Mail

_____ Website _____ Newsletter _____ Newspaper _____ Radio _____ Staff

_____ Speaker _____ User of the Service or Other ____________________________

Special Notes ____

____

____

____

____

As the coordinator of the public speaker bureau, you may have several responsibilities within the organization; surely you are busy. However, none of this is relevant to the individual and group who made the speakers bureau request. This person is asking the questions above and wants the answers quickly. From the beginning, it is important for you to establish with the group's contact person expectations on how and when you move from request to final program delivery. There are several ways to communicate this.

First, you can start by simply calling the contact person, noting that you received the request. At this time you can ask any questions you may have about the request. Can you learn more about the audience? Is this speaking engagement part of a larger program? Is there some flexibility with the date and time? Most important you want to explain the process and expected timeline that you foresee in meeting the request so there is a good understanding of the expectations in meeting the speaker bureau request. Do not hang up until you feel that the contact person understands and is at a high comfort level for this process and timeline of providing this educational service. Our experience in the health and human services fields has shown us that *incongruent expectations* are what make for unhappy customers.

Another communiqué to the contact person can be in the form of an *acknowledgement* letter. (see **Exhibit 7.2**). While this may seem like an extra step, especially since you already talked with the coordinator, it is important to document your negotiated arrangement, early on, in meeting the request. This is not the final confirmation, which will be covered later in the manual, but a confirmation that you received the request and will be working to meet the needs of the group.

Generally, the Points to Make in an Acknowledgement Letter Are

- Acknowledge receipt of the request
- Reiterate the needs of the request (topic, time, date, place, etc.)
- Explain the process that you use to secure speakers
- Note costs to the group, if any
- State an estimated timeline for when you will confirm your ability to meet the request
- Note that you will make a final confirmation soon
- Thank the group for their interest in this educational program

You will have several contacts with this person before the speakers bureau program is over. It is important for you to develop a *good rapport* with the individual; make sure that you are in a "customer service" mode for each contact you have with this individual. Both of you have a vested interest in seeing that the program happens without incident and that the customer group is happy with your organization's educational service. Even though you may be from a non-profit volunteer organization, the public expects good service.

If you explain to the contact person in a professional manner the process, parameters, and any limitations that you may have in meeting the request, most people will be understanding and work with you to create a good educational experience for the customer group. Be disciplined in not promising something that you are not certain that you can deliver. You and the group's coordinator will look good, be happy, and most important the group will be pleased to have heard the important educational message from your organization. Whenever the contact person mentions something in the program that is at variance with the information that you have to date, don't hesitate to ask the representative to review the documentation. Again, the path to a satisfied customer it to avoid early on any missed expectations.

Open, thorough, and frequent communication between you and the group's contact person should be expected. The adage, "No news is good news," is not a healthy one if you are managing a public speaker bureau. At the risk of being too detail oriented, overly concerned about potential problems, or even bothersome is worth it, if it avoids a missed expectation.

EXHIBIT 7.2

Request for Speaker Acknowledgement Letter

Date

ACKNOWLEDGEMENT

Name of Contact Person
Name Of Requesting Organization
Street Address
City/Town, State, Zip Code

Dear Contact Person:

This letter acknowledges that we have received your request to have a representative from (name of your organization) present an educational session at your site. The following is a summary of our understanding of your request. Should any of the information be inaccurate at this time, please contact me at the phone number or e-mail address provided so we can work to meet your request.

TOPIC: ______________________________

AUDIENCE: ________________ ANTICIPATED # ________

DATE: ______________________________

TIME: ______________________________

SITE: ______________________________

Once we have secured a speaker for your request, we will send you a *confirmation letter* along with any additional information such as audiovisual needs of the speaker. Please note that while our public speaker bureau is free of charge, it is a volunteer supported service and not all requests can be fulfilled. In the event that we are unable to fulfill your request, we will notify you no later than two weeks prior to your scheduled event.

Should you need to change or cancel the request, we would appreciate notification as soon as possible. I can be reached at (your phone number) or (e-mail address). We look forward to working with you on this educational program to (use organization's current program goal or mission: e.g., "fight heart disease and stroke").

Sincerely,

Michelle Groves, M.P.H., CHES
Coordinator of Community Programs

CHAPTER EIGHT

Securing a Speaker for an Engagement

You receive a request for a speaker, and you are naturally excited about the prospect of meeting the customer group's need. You review the topic and the perfect speaker comes to mind. You pick up the phone and call the speaker; she is not there so you leave a brief message. A few days go by and you haven't heard back from the prospective speaker. You call the speaker again and leave another message. The next day you pick up a message from your office from the prospective speaker who is returning your call. You call back the speaker again and find out that she is not available. You identify yourself to the speaker's support staff and explain the purpose of your call. The support staff person recognizes your request and notes that the speaker has actually tried to get in touch with you; she tells you that you are difficult to reach. You ask for a good time to phone the prospective speaker; you are told tomorrow afternoon. In the meantime the contact person from the group calls and wants to know who the speaker is for your group. You explain to the group's coordinator, "you are working on it." The next afternoon you successfully reach the prospective speaker. She is very interested in doing the presentation but has several parameters before she can commit. You don't know the answers to these requests, and say that you will check with the group's coordinator. You call back the coordinator who is not available; you leave a message. The next day you hear back from the coordinator and find that the parameters that the speaker must work within will not work for the group. You tell the coordinator that you have another speaker in mind and will get back to her shortly. You think of another speaker who may make this presentation. You call the second prospective speaker; he is unavailable so you leave a message . . .

Sound familiar? The scenario above gets played out time and again with health and human services organizations' public speaker bureaus. Recruiting speakers this way can take days, even weeks. It is inefficient and frustrating for all parties. Even with the advent of voice mail and email the chances of matching a speaker with a request in a timely manner is unlikely. Yes, with a little bit of luck, sometimes it works. We have found it to be the exception rather than the rule. If ultimately you have to make "the ask" to match a speaker to a request, then how else would you recruit speakers?

We suggest a more systematic and coordinated approach. First you design a running list of requests (see **Exhibit 8.1**). The list could contain:

- Requested topic
- Date(s)
- Group description
- General location
- Contact person's name and phone number

You send the list out (mail or email) to your *pool of active speakers.* You could send this list out monthly or bimonthly. You also send a cover memo with instructions to the speakers on how to respond to these requests (see **Exhibit 8.2**). Essentially you are asking all of the speakers to review the list of requests and select the one(s) to which they would like to commit. The speakers call you back to ask any questions or make the commitment to speak at one of the engagements. Once you have a commitment, the speaker's name goes on the running lists of requests and you begin the speaker confirmation process (see below).

There are a number of important advantages to this system. First you are essentially making a single "ask" to all of your speakers for several requests. This is very efficient and even more efficient with the advent of email. Second, the speakers get to see all of the requests and may be interested in an engagement that you ordinarily would not think there is a match. Third, the speakers begin to see other speakers' names on the list and all of the activity. This makes some speakers feel that if they are not active then they are conspicuously absent from the request list. It's an indirect motivator to keep your speakers involved. We've had speakers comment, even within another context of the organization: "I do get your speakers request list and feel bad that I haven't made one recently. I'll make an extra effort to sign up for a request, soon." It also creates the feeling that the speakers are part of something big that is making a difference in meeting the mission of the organization. Fourth, you move all of your speakers into an easy and consistent *direct ask and response system* of recruitment so you don't waste everyone's time communicating in non-productive areas. Finally,

EXHIBIT 8.1

Speaker Recruitment/Assignment Calendar

Speaker Requests for September 1998

Below are the speaker requests, to date for September. Please review these details and call or email Michelle Groves, Coordinator of Community Programs at 215-898-1776/m.groves@agency.org if you are able to contribute. Thank you for considering these requests.

ORGANIZATION & ADDRESS	DATE(s)	TIME	LOCATION/ AUDIENCE	TOPIC	SPEAKER CONFIRMED	SITE COORDINATOR
Hutchinson Place 3439 N. Hutchinson St. Philadelphia, PA 19140	Monday, Sept. 14, 1998 Or Monday, Sept 28, 1998	2:00 PM –3:00 PM	20 Addictions Recovering Women	Risk Reduction of High Blood Pressure	Mark Richards, M.D.	Ms. Jennie Brown Activities Director
Crozer Chester Medical Center One Medical Center Blvd. Rehab Unit, 2nd floor Chester, PA 19013	Thursday, Sept. 17, 1998	10:00 AM –11:00 AM	10 Post-op CVD Patients	Nutrition & Diet		Rickie Roberts, RN
EXCL Wellness Center 1650 Arch Street Philadelphia, PA 19103	Wednesday, Sept. 23, 1998	12:15 PM –1:00 PM	10–20 EPA Employees	Fitness for Middle Age		Robert Cross, Associate Director of EXCEL Wellness
The Gathering Place 6726 Rising Sun Avenue Philadelphia, PA 19111	Monday, Sept. 28, 1998	1:00 PM –2:00 PM	20–40 Older Adults	Prevention and Recognition of Diabetes	June Marshall, M.S.N., C.D.E	Mrs. Reilly, Director of Activities

when you are dealing with higher volume requests, it becomes difficult to keep track of whom you asked for what program and how many times you had made the ask. With this speaker bureau request mailer, the task of recruitment becomes routine. It becomes a system. And it works!

Certainly there will be occasions where you want to streamline the process and directly call a speaker to meet a request. It may be an esoteric area to which only some speakers can provide support. It may be a special group or a special occasion where you want to hand pick the speaker that best fits the engagement. Or you may have a tight turn around time that cannot wait for the regular mailing. You can always invoke the old order of doing "the ask" by phone, email, or in person. These are the programs that deserve the extra attention from you and your staff. And with some extra attention your strategic asks will likely result in more benefits. If you get bogged down with the routine asks, the whole program will suffer and no one ends up having a good experience with this educational service. You risk placing the high priority asks in jeopardy. Recall the fall back position when you get so exhausted in the machinations of recruiting that you say: "At this point, I would be satisfied with a warm body." By working smarter in how you can match requests to speakers as a matter of routine, you will have time to work harder on special requests.

Enclosures

Always keep speakers up-to-date with any new publications from your organization. These can include position papers, educational brochures, research or service reports. To stimulate interest in these monthly assignment mailings your can insert information about a national health observance month. For the National Health Observance Calendar log onto http://www.healthfinder.gov/library/nho/nho.asp.

CONFIRMING THE SPEAKER REQUEST

At this point you get to hear the most satisfying statement from your speaker: "Yes, I'll do it." Now it is time to confirm the speaking engagement.

Before sending out your confirmations to the speaker and the group's contact person, review all of your material and information about the request. After the speaker signs up or says yes, check back with the group requesting the program and go over every detail about the request. This is the information and direction that you will be providing to the speaker. Generally you want to reconfirm or refine information that you may have already.

EXHIBIT 8.2

Cover Memo To Accompany Recruitment/Assignment Calendar

TO:	Members of the AHA, SEPA Affiliate Speaker Bureau
FROM	Speaker Bureau Coordinator's Name
DATE:	Current Date
RE:	February Speaker Requests

Enclosed are the Speaker Bureau requests for February. Please review the details to see if any requests match your area of expertise and accommodate your schedule. Note that February is *Heart Month* and we would like to make every effort to fill these engagements and share our life-saving messages. Contact me to discuss these programs further or to volunteer for one of the programs (phone # and email). If you are able to participate, we will list you as the confirmed speaker.

We have enclosed the latest Scientific Statement on *Physical Activity and Cardiovascular Disease* that may be useful in your presentations.

Last year our Speaker Bureau was able to reach an estimated 1200 people with information and messages about the prevention, risks, signs & symptoms, and treatment of cardiovascular diseases and stroke.

Thank you for considering these requests and we appreciate your ongoing commitment to the AHA Speaker Bureau.

Encl: Calendar
Scientific Statement

Information to confirm with the group requesting a speaker:

- Topic
- Date
- Time (noting early arrival if needed)
- Location (accept any directions from the coordinator)
- Place (accept any navigation tips)
- Audience description
- Setting (e.g., stand alone program, guest speaker within a program)
- Length of presentation
- Audiovisual needs (videos, charts, models, etc.)
- Need for educational materials

Once you have gained a commitment from your speaker and you have enough information to make a confirmation, it is time to *put the confirmation in writing*. The confirmation letter should be direct, cogent, and unambiguous. While our recommended approach and sample may seem a little formal, keep in mind that this is an important communiqué, which, from here on, structures the success of the speaking engagement. Thus the confirmation should not be a long narrative covering points other than the business at hand—giving your speaker the information she needs to get to the speaking engagement. This is not the place to conduct an orientation or to make informal comments to your speaker—that should be done at other times and in other formats as discussed in the manual. Nor should you devote too much space to "overly thank" the speaker. Again, this can be accomplished at another time. A *sample confirmation letter and packet* should have the following components:

- Opening statement with a brief thank you and clear language that the letter is a confirmation for the commitment that the speaker has already made
- List in the confirmation letter (we recommend indenting) pertinent information about the speaking engagement, which includes:
    - *Topic* (A description or detailed outline can accompany the letter.)
    - *Day and date* (Make sure these match.)
    - *Time of presentation* (Explain to the speaker the format if the presentation is part of a larger program. If this is the case, be certain the speaker understands the time to be on hand and the actual presentation time.)
    - *Length of presentation* (Explain any limitations of time in the program.)

- *Audience* (Do your best to describe to the speaker the characteristics of the audience.)
- *Estimated number in audience* (This will help the speaker make decisions on style and delivery of the presentation)
- *Location* (Use formal name first, then qualify if an informal name is used in the community.)
- *Place* (This gives more specificity to the speaker, e.g. multipurpose room of the YMCA.)
- *Education materials* (literature, brochures, and other handouts—You can list the titles of these in the letter.)
- *Audiovisual materials and equipment* (Be specific here.)
- *Contact person* (Share as much information as is known.)

The speaker will invariably be looking at the confirmation to prepare for the presentation and also to literally guide the speaker to the engagement. Therefore we want the confirmation letter to be uncluttered; it should contain only the *essential elements* for the presentation. Note how we indented the "who, what, where, when," information. Speakers will take the letter and have it next to them in the car, like a co-pilot. Therefore we want the look to facilitate easy use of the information in its natural setting.

- *Conditions:* after you have the general information stated in the letter note any conditions related to this information. For example, Is the presentation part of a larger program? Is there something special about the audience of which the speaker should be aware? Will the contact person meet the speaker at a certain location? This is where you refine your general information but don't clutter the confirmation.
- *Educational tools:* reinforce what educational tools, if any, should be used and the need for audiovisual equipment. Ideally the speaker is already familiar with any supporting educational tools. If not, you need to make arrangements to have the speaker review the material. Also, we recommend that you give the speaker copies of what *handouts* will be given to the audience. It is important for the speaker to see what information your organization is giving out to the public or its constituents. It does not look good if your speaker is unprepared to react to questions related to your handouts or if your speaker contradicts such information
- *Directions:* While this may take some extra time it is ideal to get directions to the speaking engagement for your speaker. Narrative directions will work. Most organizations have preprinted directions and map to their locations, remember to

ask the coordinator for this information. Also, this is the time for the coordinator to describe any nuance for getting to a facility. Using the Internet, you can easily look up and print out directions to most facilities.

- *Evaluation form:* A speaker should have the opportunity to evaluate the coordination (your organization's and the site's) of the speaking engagement and the overall experience with the program. If you are not on site for the program there is much to learn from what actually happened at the program. Also, the speaker can give an assessment of the program that can be corroborated with the coordinator's evaluation to determine the service provided by your organization and the overall impression of the program from the audience. Overall, it is important to communicate to your speaker that there is an evaluation process in place for all involved to give input that evaluates the educational experience and helps improve the quality of the program.
- *Other items:* Include any other items or information that will make the program more convenient and successful for your speaker. Again, include only information relevant to the speaking engagement. Avoid the convenience of handling other matters in the mailing. Stay focused and you increase the likelihood that all will go well with the speaking engagement.

Having sent out the confirmation letter and packet of materials to your speaker, you know that it is time to write a confirmation letter to the coordinator who requested the speaking engagement—not necessarily. We have found that you can save time and increase your efficiency by *carbon copying* the site coordinator on the speaker's confirmation letter (note on sample confirmation letter, **Exhibit 8.3**). Unless there is a need to clarify other issues, or there are special circumstances, the coordinator can glean all the information that is necessary from the speaker's confirmation letter. This practice is advantageous because all three parties—speaker, site coordinator, and speaker bureau coordinator—are seeing the same letter with the same information so there is less room for error on who needs to be where, when, and to deliver what educational service. Separate letters can lead to mis- or missed information. This way all parties are literally reading from the same page and expectations should be consistent across parties.

Once you have enjoyed the sweet success of a few devoted speakers who can easily fill your routine requests, you will feel the force of information flowing to you from the systems that you so dutifully set up to assist you. Information on your request calendar will certainly change. Some

EXHIBIT 8.3

Sample Speaker Confirmation Letter

Date

Name of Speaker
Speaker's Address
City/Town, State, Zip Code

CONFIRMATION

Dear (Name of Speaker):

Thank you for agreeing to make a presentation to (name of group or organization) on behalf of (your organization's name). To confirm this upcoming engagement, we have the following information:

ORGANIZATION: Use for name of organization	
CONTACT PERSON: Name and telephone number	
SPEAKING SITE (address) and onsite LOCATION	
TOPIC:	
DATE: Day of week and date	TIME: Use AM and/or PM
AUDIENCE:	ANTICIPATED #
AV Needs:	CONDITION: Sole presenter, panel

Enclosed find a sample packet of the educational materials we will send to the above organization to support your session. Please review these so you are prepared and comfortable answering any question that these materials may generate from the audience.

To better measure the impact of our Speaker Bureau we will forward the contact person from the site above with an evaluation form. Enclosed is your evaluation form to give us feedback on your experience with the program. As you can understand, the evaluations are an important component of our service; it's the primary way to assess our impact in reaching multiple audiences and gauging the quality of our programming.

Once again, thank you for your continued support and giving of your time and talent. Together we can continue to (organization's recent objective, goal or mission, e.g., "fight heart disease and stroke as the leading cause of death in this country.")

Sincerely,

Name
Coordinator, Public Speaker Bureau

CC (Name of Group's Site Coordinator and phone #)

group coordinators will call back to adjust a time. Some coordinators will cancel requests. Speakers who initially could not help out have been freed to volunteer, and some confirmed speakers will have to cancel for some unforeseen emergency. This change of information does not even account for how you will manage to remember which speakers received the various follow-up information needed for their speaking engagements.

How will you manage all of this changing information? Even the most committed and conscientious follow-up individual who can multi-task needs a good record system for showing what was accomplished to date. We suggest using a *speaker assignment management table,* similar to the speaker recruitment/assignment calendar, to manage this information. (**See Exhibit 8.4**)

In this table you can list the information from the request that you initially received, such as the organization making the request, contact person and coordinates, topic, date and time of the speaking request. After you have mailed out your Speaker Recruitment/Assignment Calendar, you will need a way to easily record and keep up-to-date information that will be generated, and changing, from this solicitation. A most important recording is the name of the speaker assigned to a speaking engagement. This table will also help you organize and manage the follow-up steps that prepare the speaker who has volunteered for an assignment. You need to document the date that the confirmations are sent, to the speaker and to the contact person at the organization or group requesting the program. You need to keep a notation of the audiovisual needs. As we discussed in Chapter 6, securing the right audio visuals for a program is never as easy as it may seem and it is part of those little things that can impact the success of a program and cause those involved not to have a good experience. It is unlikely that you will remember the various AV needs of the many programs that you will be managing. A simple notation on this table keeps you organized. When support materials are shipped to the speaker or site, you can mark the date on this table. This gives you a reference point for if, or when, you have to begin trouble-shooting materials that have not made it to the intended locations. We guarantee that this will unfortunately happen and you will find tracking your activity in this area useful. As program follow-up winds down, you will want to record when the evaluation forms come back from the audience, site coordinator, and speaker.

A lot of paper will be moving, emails will poor in, and calls will be made to you with up-to-date information on the many programs, so it is good to have a management tool that you can refer to at a glance. Finally, you can mark on the table when you sent the summary evaluations to the speaker and maybe to the site coordinator. A final thank you note may accompany this summary evaluation.

EXHIBIT 8.4

Speaker Assignment Management Table

Org/Group	Contact	Topic	Date	Time	Acknowlgmnt Sent	Speaker Assigned	AV Needs	Confirmation Org./Speaker		Materials Sent	Evaluations Group/Speaker/Coordinator		

Now that you have seen a good sample speaker bureau management tool, there may be the temptation to delegate the management of the program to one of your assistants or junior staff. Certainly parts of this managing process of the public speaker bureau are rote; that, after all, is one of our objectives in this manual. However, we recommend that you continue to provide *good oversight and ownership of the program,* even with the best of support staff. Our experience has been, and our approach to managing an efficient and effective speakers bureau is, not to have the professional staff person assigned to manage the speaker bureau abdicate responsibility. As we mentioned in the preface and in the introduction to this manual, we found that far too many speaker bureaus were relegated to those who, in the end, did not have ultimate responsibility or a vested interest in the success of the program.

Today, with personal computers at almost every desk and the shared servers, you should be able to get support from others and all can contribute to a shared file of this speaker assignment management table. You could divide up the tasks where one staff member works with information related to the speaker and the other works with the site coordinator. In any event, it is important to be disciplined and go back to a "gold standard" document that everyone agrees is the latest update on a single program. Add to the program at hand the many programs that should come your way as your program succeeds. Having a good information management system is critical. The most organized person cannot piece together the inevitably changing information from a host of emails, notes, sticky notes, and phone messages. Clear and accurate confirmations to all stakeholders get the speaker requests past the halfway point.

Even with the best speaker assignment information system and speaker engagement recruitment efforts by you, your staff, and speakers, there will be times when you simply cannot meet a program request. How do you handle this situation? We continue to stress in this manual the importance of having a well thought out customer communications plan and implementation strategy to minimize the fall out from dissatisfied constituents.

During the initial and subsequent encounters with the group's contact person, you need to emphasize the possibility that your organization may not be able to meet every request. It is important to define your limitations and any variables in the request that may make securing the speaker more challenging. For example, the distance for a speaker to travel could shorten your speaker availability list. The day and time of their program may be a challenge, or an esoteric topic could cramp the field of potential speakers.

As the unavailability of a speaker becomes more evident, be prepared if the coordinator asks for a speaker on another topic, or is willing to make some changes on the group's end to increase the likelihood of attracting a speaker. Some group coordinators have no problem switching horses in midstream, or sending you back to square one. Be prepared when recruitment for the alternative request fails and it appears that your organization has failed twice in meeting the group's request.

The key to contingency plans is letting the contact person know any limitations and challenges to meeting alternative requests. *Do not make promises that you cannot deliver.* Always paint a realistic picture for the group's coordinator.

By nature, health and human services workers take pride in being able to help, service, and meet the needs of our constituents. However, to set up unlikely expectations for your constituents can be more damaging than your inability to meet their needs. As tempting as it may be to placate your constituents by boosting success with "outside chances," continue to keep the group's coordinator well grounded in the realities of a successful program. This does not mean that you project a pessimistic attitude. You can be hopeful that you will meet the needs of your constituents, and in most cases you will. By keeping a professional demeanor and maintaining open and sincere communication with the group's coordinator you can keep expectations in line with what your agency can realistically deliver. In the end, the group's coordinator will recognize you for your strong efforts and perseverance and should be grateful to you for keeping a realistic eye toward ensuring success for the program.

When the time comes to call the effort off, in finding a speaker, you should alert the group's coordinator as soon as possible. *While it is not a call that we like to make, the situation never improves by procrastinating.* Follow up with an apology letter and maybe send the group educational materials related to their topic of interest (See **Exhibit 8.5**). There is no need to apologize profusely. Keep the letter formal. You know that you gave a good faith effort to match a speaker to their program and the letter will show that you are willing to continue to work with the group.

IDENTIFYING CRITICAL SUCCESS FACTORS FOR THE TIME/DATE/PLACE OF THE SPEAKING ENGAGEMENT

Certainly the essential elements and *room for no error* details are in ensuring that your speaker gets to the correct place/location on the correct date and at the correct time. Anything else, by and large, can be dealt with. You can never check this information too many times. Below are some tips

EXHIBIT 8.5

Apology Letter to Requesting Group's Coordinator

[Date]

APOLOGY

Ms. Lori Hayden
The Gathering Place Senior Center
6000 Rising Sun Avenue
Philadelphia, PA 19111

Dear Ms. Hayden:

Please accept our apology for not being able to provide you with a speaker from the [your agency's name] public speaker bureau, given your date and topic. As stated in our Public Speaker Bureau promotional materials, all of our speakers provide their service on a volunteer basis; therefore, we may not be able to secure a speaker for every requested speaking engagement. Please know that our staff and volunteers made every effort to match a speaker to your scheduled program. At times, these matches are not always possible.

Given your group's interest in this important [*qualifier*, e.g., health] topic, we are enclosing complimentary educational materials that we hope your members find useful.

Again, I apologize for our inability to meet this request and for any inconvenience to you and your group. We expect that we can continue to work with you to secure a speaker for a future engagement. Simply complete and send back the Speaker Request Form, and we will get to work to meet your educational needs.

Sincerely,

Michelle Groves, M.P.H., CHES
Coordinator of Community Programs

Enclosure: Educational Materials
Speaker Request Form

and critical success factors that increase the chances of your speaker arriving at the speaking engagement at the correct date/time/place. Use this as a check list to go over several times before the big day of the speaking engagement.

- *Day/date match*—when listing the date of the presentation include the day that it falls on, e.g., *Monday*, May 15, 2000. Looking at the wrong month and even the wrong year can happen. State the day of the calendar date and make sure it is a match.
- *Arrive early*—emphasize at every opportunity the benefits to your speaker for arriving early at a speaking engagement and, at the least, the importance of not being late. There are several benefits to arriving early. Today, security at many companies and organizations is very tight. To gain clearance to enter a building could take 20 or more minutes. Speakers need to build this into their arrival time. You can "feel the place out" and get comfortable with your location; get to know the audience a little better; practice your presentation; check your location in the facility and check your audio visual tools. This time could be used to accomplish other public relations objectives for your organization; you can get to know the group better. Or you can just sit, wait and relax before you speak—at least you're there.
- *Use formal name of location*—Organizations and places tend to take on informal, shortened, names or acronyms. This could lead to misunderstandings by the speaker on where to go. For example, in Philadelphia, PA there was a time when the name "Pennsylvania" was in the name of four hospitals—two in the same neighborhood. You can imagine the importance of knowing to which of the "Pennsylvania Hospitals" a medical transport team needs to go. Spell the name out completely so there is no chance for misinterpreting where to go to speak. Avoid acronyms or shorter names for the formal confirmation. These could be useful later only to clarify locations for the speaker.
- *Time*—use AM and PM notations in all of your communications about the speaking engagement. As mentioned earlier, some presentations are part of a broader program. Make sure that you are clear when you need the speaker to arrive on site. Having the person wait to present usually is a more favorable outcome than keeping a group waiting for the guest speaker. The larger the group, the more problematic.
- *Reminder calls*—make sure that at some point in the planning of the program that you have talked *directly* with both parties: speaker

and site coordinator. While others can be helpful, you really need to make sure the arrangements are understood by these principals. Don't chance that your messages will be "passed on."

As mentioned directly above, your *speaker confirmation letter* is a critical tool to convey this simple, yet critical information. Continue to evaluate the effectiveness of this communication. There is an adage in organizations and human resources management that 80 percent of the job is met just by showing up. This is true in managing a speaker bureau. No matter how prepared, knowledgeable, and dynamic your scheduled speaker may be, nothing is accomplished until this person shows up for the speaking engagement. A simple, yet most important, objective for you as the public speaker bureau coordinator is to ensure that your speaker gets to the right location *without incident.* Leave nothing to chance here.

CHAPTER NINE

Evaluating Your Public Speaker Bureau Program

OVERALL PROGRAM EVALUATION

Up until this point in the management of a public speaker bureau, you have been able to influence, if not control, the process. Now it is time for the presentation. This is the moment that you and your organization have been planning and waiting for; and the impact of this time is entirely up to the knowledgeable, well-oriented and trained, and dynamic speaker. All of the time that you have spent preparing for this moment is generally unnoticed, as it should be, to your audience. The process of preparing and arranging a speaker is seamless to the audience. Now that your speaker is before the group, his or her words and actions are what reflect your organization. The preparation process is one of those things that no one notices until something is missing.

Ironically, again, organizations generally do a poor job of evaluating the speaker's presentation. Regardless of how hard you and your co-workers have worked to get a good speaker here, it is all process. The *outcome* of your work will be reflected, overall, in the presentation made by your speaker. Therefore it is important to know just how well the presentation went. It must be evaluated. A motto we used in our education department is that "If the program wasn't evaluated, it didn't happen." The evaluation should be systematic, relate back to the purpose of your speakers bureau, and be used by individuals who can make changes in your program.

Let us start the discussion of the evaluation of the presentation by going back to the very beginning. Recall that an effective speakers bureau is driven by a *purpose.* Components of the evaluation of your speakers' presentation should relate to the purpose of having a speakers bureau. Questions designed for your formal or informal evaluation tools should relate to the purpose and objectives of you offering this educational service. What did you want your audience to learn? How did you want them to feel about your organization? What did you want them to do?

Ideally, the audience should be able to evaluate the presentation. In many cases, depending on the type of organization, service, and relationship to the audience, you will not be able to solicit feedback directly from each person in the audience who heard the presentation. Often, the feedback is gained in a *general sense* from the site coordinator and given back to your organization. Even so, it is important to structure or influence the evaluation tool to gain the best insight on how well you are doing in meeting your audience and organizational needs. Educational program evaluation is a discipline and skill unto itself. There are individuals trained in this area and many resources to aid in evaluation. We suggest a simple and easy to use sample evaluation form that the site coordinator should complete and mail back to your organization (see **Exhibit 9.1**). While the exact wording of questions needs to be tailored to your organization's goals, objectives, and needs, here are some major areas that should be covered.

Meeting Program Objectives: Most groups have a reason for inviting a speaker to address their group. A first question should be asked about how well the speaker met the stated objectives or purpose of the presentation.

Speaker Effectiveness: Somewhat related to the question above, you could ask how effective the group found the speaker. This tends to be subjective, but if a speaker consistently fails to do well here, you will want to make adjustments to the use of the speaker with that topic, audience, or environment.

Speaker's Style: Even more subjective is the question of the speaker's style. You can have a speaker meet the stated objectives of the presentation but the audience may not like the style of the presentation. As you can imagine, this is a difficult quality to change with seasoned speakers. Your success in this area will be with newer speakers who take advantage of your training and orientation programs and are open to feedback from the evaluations. Given that some of your organizations are a public service, folks may be critical not only on what you say, but how you say it.

Audio Visuals: The group should have an opportunity to rate the audiovisuals used in the program. One can never be sure what works with what audience. Audiovisuals should be brief, useful, and should not detract from your personal presentation. Consider these parameters when designing questions for your audiovisual feedback.

Handouts: This area is often forgotten on an evaluation or taken lightly. It should not. Handouts can have a more permanent impression and have the longer shelf life and reach for your organization's message. Include questions that can guide you on what handouts are useful and appropriate. The audience is often a better judge of handouts than the professionals or creators of the piece. Just because it is in print doesn't mean that you should use it, or it has value. This guide has given you suggestions for handouts (see Chapter 5, page 53). Generally make the handouts relevant, useful, and truthful. It is best to use handouts that are published by your organization.

Environment for Learning: While in most cases this will be beyond your control, you should encourage the site coordinator to solicit feedback on the environment where the presentation took place. When on site for direct observation, you could delicately give suggestions on how to improve the learning environment. If you control the environment, you should have a question in this area and be willing to make any reasonable changes. You can become jaded by your familiar surroundings. Those with an outsider's eye could give you useful information on easy adjustments that could improve your audience's perception. Keep in mind that some people will not separate the quality of the program with their internal comfort level. If they are not comfortable, they most likely will not be pleased with your program.

Overall Satisfaction with the Program: After evaluating the various components of the program, ask the group or coordinator to give an overall evaluation of the presentation. Many surveys have this as the first question. However, it increases the validity having them answer this after they had a chance to reflect and comment on the components of the program. We tend to use the "satisfaction" qualifier trying to solicit a more personal response from the person completing the evaluation.

Overall Experience with Your Organization: This would be more relevant if the group was on site. But even off site the group should have an opportunity to rate the overall experience and feel that they received from the representatives of your organization.

Other Questions and Open-Ended Evaluation: You will have other questions that you may want to ask (e.g., What other topics would you be interested in?). All questions can include a "comment" component. Some questionnaires ask what the audience liked "best" and "least" from the presentation. A space for open-ended suggestions could be used.

The most important screen for deciding what questions to ask is the *utilization factor.* If you are not going to use the information from a given question then it makes no sense to ask it. Be respectful of everyone's time and energy. Ask only those questions that someone intends to read, interpret, and use to improve the program. This will take some discipline; for by nature heath and human service professionals like evaluations. You may be tempted to ask a question or series of questions "just in case." Spend the time up front to decide what you will use in the evaluation data. Ask only questions that you intend to respond to. This is called having a utilization review mindset for evaluation.

Exhibit 9.1

Sample Speaker Bureau Presentation Evaluation

(Name of Organization)

The following questions will assist us in evaluating the impact of our speaker bureau service and help plan future programs for groups such as yours. Your input in the process is most important. Please take a few minutes to complete and return this evaluation in the self-addressed envelope. Thank you!

On a scale of 1 to 5, please *rate* the following items: (circle numbers only)

Speaker was able to provide pertinent information regarding the topic requested? (Objectives met)

Poor 1 2 3 4 5 Excellent

Speaker presentation style was effective? (Was speaker able to relate to and connect with audience?)

Poor 1 2 3 4 5 Excellent

Speaker provided ample time for questions and answers? (Responsiveness to audience needs)

Poor 1 2 3 4 5 Excellent

Were audiovisual tools effective? (Complete only if audiovisuals were used.)

Poor 1 2 3 4 5 Excellent

Were the educational materials provided appropriate and effective?

Poor 1 2 3 4 5 Excellent

How satisfied are you with the (*Your Organization's Name*) **Speaker Bureau?** (circle one)

Very satisfied   Satisfied   Somewhat Satisfied   Not Satisfied

How likely are you to use this Speaker Bureau again? (circle one)

Very likely Possibly likely Likely Not likely

Were there any highpoints and/or challenges you would like to comment on? (Was speaker on time, did he/she keep to time limit, specific items that increased the audience's knowledge etc.)

Name of Your Agency
Address
City, State, Zip Codes

OTHER SPEAKER EVALUATION QUESTIONS

The questions above relate directly to the presentation, the speaker's knowledge of the topic, and delivery, and the interaction with the audience. There are other process related questions that are important to have the site coordinator answer. These relate to how the speaker acted outside of the actual presentation and could influence the impression made to the audience. These types of questions are best answered by the site coordinator who sees the "behind the scenes" workings of your service. (See **Exhibit 9 .2**)

Timeliness: Ask if the speaker was on time to the site. While there may be a good reason for a speaker to be late, if it becomes a recurring theme in a speaker's evaluation you will have to address this issue. Ask if the speaker kept to the time limit. While most groups appreciate the time that your representatives give to your organization, you should be respectful of their meeting times and program plans. We have often heard the comment, "I liked the presentation, but she was a little too long." Every minute beyond the expected time for the presentation could detract from your message and the eventual evaluation of the presentation.

Availability and Responsiveness: Depending on how much interaction you allow between the speaker and the site coordinator when planning the presentation, you may want to get a feel for how well your speakers handle interaction with the coordinators. Is the speaker easily available to field questions prior to the talk? Was the speaker flexible and seem cooperative if any changes were made in the program? What is the overall demeanor of the speaker, once on site? You should not confuse knowledge and proficiency in delivering a presentation with the important *ambassador role* that the speakers play, de facto, for your organization. You may have some competent speakers who can deliver an informative, even dynamic, presentation who for some reason do not do well interacting with the coordinators. If this persona exists you will have to balance the risk of some less than optimal PR value with the messages that you are trying to disseminate.

Speaker Activities: If you are not onsite for a presentation it is critical to construct the sharpest picture of what happened at the presentation so you can make a useful evaluation for all involved. Consider questions that help you do this. Don't take actions by the speakers for granted. Some actions you may be able to infer. For example, if you ask attendees to evaluate the educational literature, you can infer if the literature was used or not. Depending on the purpose of the presentation and the organization's goals, you may want to *make sure* that certain literature was distributed or an audiovisual was used. If you are not there for the onsite presentation, the only way to know this is to ask. Consider these types of questions in the evaluation tools.

Exhibit 9.2

Sample Evaluation of Speaker by Site Coordinator

Date of Speaking Engagement: ________ Your Organization ________________

Name of Speaker: ________________________ Topic: ________________________

Did the speaker arrive on time? ☐ Yes ☐ No

If not, explain reason for tardiness. ____

Did the educational materials arrive in time for the program? ☐ Yes ☐ No

Were the handout materials appropriate for the topic ? ☐ Yes ☐ No

If no, why? ____

Were the handout materials appropriate for the audience? ☐ Yes ☐ No

If no, why? ____

Did the program start and end on time? ☐ Yes ☐ No

If no, why was program delayed/shortened? ______________________________

____

On a scale of 1–5 please rate the following. 1 = Poor and 5 = Excellent

Overall, how would you rate your group's interest?	1	2	3	4	5
Speaker was knowledgeable about the subject?	1	2	3	4	5
Speaker presentation style was effective?	1	2	3	4	5
Audiovisual tools were effective? (if used)	1	2	3	4	5
Speaker presented in a professional manner.	1	2	3	4	5
Rate your overall satisfaction with this program.	1	2	3	4	5
Rate your overall experience with our speaker bureau.	1	2	3	4	5

(Provide any additional comments on back)

Thank you for your feedback on this program. Please mail evaluation to (address)

EVALUATING THE SITE AND SITE COORDINATOR

It is fair and useful to have the speaker complete an evaluation form of the experience with the public speaker bureau coordination process, the site coordinator, and events that took place during the presentation. Most organizations do not give the speaker an opportunity to make a formal assessment of the experience. Here is a sample evaluation form that can be completed by your speaker (see **Exhibit 9.3**) and some general areas to cover.

Timeliness of Program: Ask the speaker if the site coordinator or another representative from the inviting group was on hand to greet and direct her. Ask if the program started at the planned time and ask the speaker if she had the requisite time to make the presentation. Allow space for comments so you can determine what, if anything, reasonably influenced the changes as you understood them prior to the presentation.

Hospitality of the Site Coordinator: Don't take this for granted. It is fair to assess how the speaker was handled at the site. Craft evaluation questions to allow the speaker to describe how she felt as an invited speaker. Did the representatives greet the speaker and make her feel at home? Was their adequate direction to navigate to and around the site? Did folks make it easy to be present as a guest? Was there a warm welcome and appropriate introduction to the audience? As an example, we recall a speaking engagement scheduled at a well recognized center city company. The speaker arrived some 45 minutes early and was shown by a human resource representative a room with chairs. Ten minutes past the hour of the scheduled presentation, there was no sign of anyone. The staff from human resources never returned to the room to check on the progress of the program. The speaker went back to the human resources office and reported on the situation. The human resources representative said that she would phone some of the department heads to "drum up business" and wanted to know what would be a better start time. The speaker respectfully declined the postponed start time and asked the human resources manager to contact the agency to reschedule a program that included some publicity for the event. No sooner had the speaker returned to the agency to report in, the human resources manager called to complain about the behavior of the guest speaker.

Certainly a situation like this is beyond your control. You may not be able to influence hospitality, but it is important to understand the environment in which the speaker will enter. When things go poorly in this area, non-profit groups are hesitant to complain, make recommendations, or not serve a particular group at a particular location in the future. However, representatives from your organization should not be exploited, even if the service is supported by the constituent's audience or the general public. Your speakers deserve to be treated in a hospitable and professional manner. As the speakers bureau coordinator, you should devise a response plan to improve an unhealthy situation, if there will be a future interaction between your organization and such a group. This is why a good evaluation tool is essential. Even if you are onsite at the presentation some of these questions are only valid if answered by the speaker. You need your facts and accurate information to change any problems in this delicate area. Your organization must decide what is acceptable and how to make adjustments and balance this against achieving your educational goals and objectives of this service.

Educational Environment: Allow the speaker to comment on the educational environment. Was it adequate or did it present challenges that impacted the nature and delivery of the message? Was the size of the room adequate? Was it overcrowded? Too big for a small group? How was the lighting? How were the acoustics? Any competing background noise or distractions? How did the audiovisuals work with the meeting room? Was the room comfortable for the audience? What inhibited the presentation or the optimal style of delivery? All these questions are just as relevant to the speaker as they are to the audience receiving a message. As experienced presenters, we see variables from a different vantage point and perspective than those who do not make presentations. Creating an environment conducive to learning so participants can hear your organization's message is a critical part in implementing the speaker bureau service.

Audiovisuals and Support: Allow the speaker to explain the logistics of the audiovisuals and any support. This area continues to be the most challenging routine for speakers. The adage, "The best laid plans . . ." was crafted for this very activity. It seems that even when folks are attentive to the AV needs of a presentation many times there are snafus. As mentioned earlier in the manual, AV needs are increasingly becoming complex. There is rarely an easy "plug and play" set up for audiovisuals. It takes a skilled speaker to recuperate from an audiovisual problem. We all have our audiovisual horror stories when making presentations. Your evaluation tool can begin to diagnose such problems so they can be potentially adjusted for the future. Leave nothing to chance in this area.

Connectedness and Fit with the Audience: Create questions that allow the speaker to describe the overall fit with the audience. Did the audience seem interested or aware of the topic presented? Was there a sense of missed expectations from the audience? An experienced speaker can detect this even if an audience is trying to be attentive and polite. Our experiences in education have shown that most of the discontent between teachers and students in a formal course has been because of *missed expectations* from either the instructors or the students. The chances of this happening in a speakers bureau format are much greater and probably unavoidable in some cases. You have to make choices as to what you are willing to risk. For example, some organizations do not mind serving as "filler" speakers or taking on last minute invitations. They may be completely satisfied with some of their messages getting out there and are pleased to be visible. Other organizations want a more controlled environment and some educational messages lend themselves to a much more contrived atmosphere. Again, the purpose and nature of your program should help you to make these decisions.

Hospitality of the Audience: After working with a speakers bureau for some time you may eventually face the situation where the audience was inhospitable, maybe even rude, to your speaker. This is different than the squirming or tortured audience who is experiencing "unmet expectations." This behavior is just plain bad manners and is an unfortunate situation for the speaker who invested time in preparing a presentation. One experience I (first author) had was making a presentation to an auditorium filled with junior high school students. I expected them to be noisy and inattentive at times, but not during the entire presentation. There were plenty of teachers in the auditorium, so the disturbing part was that none of the teachers made any attempt to change the situation. Therefore, both students and the guest speaker had to suffer through 42 minutes of speaking past each other. When the speakers bureau coordinator called for an assessment of the presentation, I gave her the picture; she was surprised to hear this. She was most apologetic, and I could tell that she didn't know what to do. Maybe there is nothing you can do after such a bad experience for one of your speakers. You, as the coordinator, have to be willing to accurately assess the situation and decide on a response plan. Again, a good assessment tool for the speaker who "lived the experience" should give you the information to react in a productive manner.

Many nonprofits that receive their money from the general public are hesitant to address these unfortunate situations when they occur. The inviting organization may take the attitudes that they pay for this service through their contributions so any sub-optimal experience can be overlooked. Another perspective that we advocate is that good stewardship requires you to create a healthy environment for your speakers, especially if they volunteer their time.

Exhibit 9.3

Speaker Evaluation of Site, Group's Coordinator, and Overall Experience

Date of Speaking Engagement: ________ Name of Organization ____________

Did you have any problems locating the site? ☐ Yes ☐ No

Was the contact person listed on your confirmation letter in attendance to greet you and/or introduce you? ☐ Yes ☐ No

Were the materials mailed earlier available upon your arrival to the site? ☐ Yes ☐ No

Were the materials appropriate for the topic? ☐ Yes ☐ No

If no, what other publications/items would you recommend?

____

Did the program start and end on time? ☐ Yes ☐ No

If no, why was program delayed/shortened? ____________________

Was the room conducive to learning? ☐ Yes ☐ No

If no, explain: ______________________________

Was AV equipment set up prior to your arrival? ☐ Yes ☐ No ☐ Not Applicable

Was the location appropriate for your choice of audio-visual equipment? ☐ Yes ☐ No

If no, please state why? (too much light, no screen available etc.)

____

Do you feel you had sufficient background information to address the topic? ☐ Yes ☐ No

On a scale of 1–5 please rate the following. 1 = Poor and 5 = Excellent					
Overall, how would you rate the audience interest?	1	2	3	4	5
Rate your experience with this engagement?	1	2	3	4	5
Rate your overall experience with the management of (agency) public speaker bureau	1	2	3	4	5

(Provide any additional comments on back)

Thank you for your feedback on this program. Please mail evaluation to (address)

IMPLEMENTING CONTINUOUS EVALUATION AND IMPROVEMENT OF YOUR PUBLIC SPEAKER BUREAU PROGRAM

By working through the many steps, activities, and suggestions in this public speaker bureau manual your program should show a marked improvement. And improvements should be continuous in your programs. This final section discusses some general principles and ideas for continuous program evaluation and improvement.

Once you start the discussion of program evaluation it is important to come to terms with terms. Program evaluation is a high level skill practiced by well-trained and dedicated professions in this field. These individuals have established strategies, activities, and resources needed to carry out "good" program evaluation. You may not be able to, nor may it be necessary to, fund an extensive program evaluation of your speakers bureau program. However, that does not mean that you cannot put into place some *basic program evaluation*, review, and response activities that justify just how your speakers bureau is run and what impact it is having on the goals and objectives of your organization. Increasingly, funders, government, users of services, and the public are asking to see evidence that programs work and are worthy of support. They want to know if programs make a difference, and if they do how and what steps are being taken to ensure that they are improved. So what impact is your speakers bureau having?

Unfortunately that is a difficult question to answer in its pure sense. Ideally the participants who heard your speakers bureau presentations over time are the ones who can answer this important question. Essentially we are asking what benefits during or after the presentation accrued to the participants who attended the program. These outcomes or benefits could come in the form of new knowledge, newly gained skills, or a change in values, attitudes, behavior, or even condition (e.g. becoming less economically dependent). There is usually a *leveling of benefits.* However, the nature of a speakers bureau presentation is an episodic and brief encounter with a group of individuals. Ostensibly organizations should not expect a speakers bureau program to have high-level impact on complex health, social service, and education goals.

Then what can you expect from your speakers bureau? The best way to begin answering this question is to go back to the beginning. Recall that this manual began with the premise that your speakers bureau should be *purpose driven.* Before laying out your overall program evaluation plan you should revisit and completely understand the purpose and objectives of your speakers bureau.

Program evaluators have made the important distinction between *summative* evaluation and *formative* evaluation. Summative evaluation looks to what impact the program had for the intended audience. Do participants know which foods are healthier for them now that they heard a health education message? Would the participants know what to do in case of a natural disaster after seeing a video? Are they more likely to become involved in recycling on a regular basis? Are they more open to considering education reform in their school districts? These are all reasonable program impact or summative evaluation questions.

While summative evaluation questions are the heart of the matter in explaining what difference your organization makes, it is unlikely that you can reach the participants who attended a speakers bureau presentation. Realistically this is a "one shot deal" encounter with an audience. It would be difficult to track them at a later time to assess the impact your message had on them. Then what value is there in such an activity, and why should you invest time in evaluation or improvement? Again, these are questions your organization needs to answer given your mission, goals, objectives, and circumstances. Often a speakers bureau is a part of a larger educational campaign of an agency. Therefore, individuals may be exposed to several messages, the speakers bureau being one of them. You could solicit support from evaluation experts to determine just what you could realistically measure in summative evaluation of your speakers bureau.

Assuming that your speakers bureau programs have some value, we can now talk about formative evaluation. Formative evaluation looks at how programs are delivered and under what conditions. Assuming a program works, there is usually an ideal way to *implement the program* and set or control certain conditions. These are the more familiar evaluation activities to program managers.

Before outlining the stages of program evaluation, we will discuss some fundamental principles to keep in mind.

Users of the Evaluation Reports: Evaluation is nothing new to not-for-profit or government organizations. Evaluation has been a steady and necessary component of most education and service programs, regardless of who delivers the program. What is new is the reorienting of the final evaluation reports to who, in practice, will be using the reports. This is not the same as who asked for the report or who will give a cursory review of the report, but who will actually make use of the evaluation report? This is important insight to consider before planning the evaluation activities, however elementary they may be. Ask the user or users of the report what information they find valuable. In your case, the user may simply be you as the speakers bureau coordinator. Or the users could include the executive director and the Board members of your agency. The development staff may be a group who could give insight into what kind of outcomes or impacts funders would respond favorably to. Whoever intends to make good use of your evaluation report should be consulted before planning and designing evaluations. Make sure you evaluate components of the program that will be useful to these stakeholders.

Information You Intend to Use: Evaluations such as questionnaires and interviews, if done properly, take much time and effort from all involved in the process. Most program managers are sensitive to the notion that questionnaires should be brief so people will be more likely to complete them. This is true. However, a less understood reason to streamline questionnaires is that you should solicit only information that you plan to use or have a reasonable expectation of reacting to the findings. If you do not plan on making changes to a component of the program then why ask questions related to that component? If you are not in a position of removing a speaker from the bureau, you may want to keep such questions directly related to the speaker to a minimum. If you can offer only a limited range of topics to audiences, then it is better to list these topics and have the audience check those of interest, rather than keeping an open-ended, What else? question on the evaluation form.

You may be thinking that you cannot predict what information you will use so you don't want to miss the opportunity to gather more information while you have the chance. This is also true. The ever-present temptation when doing evaluation and research is to gather more information when you have the chance. It is natural to want to do so. However, in fairness to all involved in the evaluation process you have to be disciplined to include only questions related to information that you have a reasonable expectation of using.

End User Tested Evaluation Tools: Any evaluation tool in the process should be seen and tested as much as possible by any of the users. While fundamental to good evaluation practice, this suggestion is overlooked or followed only for some of the users of the evaluation tool. Take for example your seemingly basic and simple site coordinator's evaluation questionnaire. Identify the number of individuals who need to handle this questionnaire in order for it to get used and interpreted. As an illustration, it may start with a program coordinator who mails the questionnaire to the site or to the speaker to give to the site coordinator. The site coordinator needs to complete the survey. The survey may be mailed back to your organization to someone who receives the mail but may not be in your department. The survey needs to go to someone in your department or program area. The completed survey needs to be reviewed and given possibly to a data entry individual who is tabulating an aggregate of all presentations in a given time. You get the picture? Anyone who handles the survey should have an opportunity to see and comment on the survey—if for nothing more than to identify what it is and know where it needs to go next in the organization.

Keep in mind that while this manual has introduced a number of processes and tools to conduct evaluations of your speakers, evaluations need a context. Information gathered from evaluations should be reviewed, assessed, and acted upon within a context.

For example, on one occasion we conducted a follow-up call to a site coordinator after a presentation on skin cancer awareness was made to employees of a large center city company. The site coordinator shared that the employees where not pleased with the presentation. This was quite surprising because we assigned an experienced dermatologist who had received excellent ratings from prior speaking engagements, and we considered the individual quite knowledgeable in this program. We observed previously that he delivered presentations in a professional manner. We learned that the presentation was made at the company's "lunch and learn" series. Understandably, employees were not prepared to see clinical slides of basal cell and squamous cell carcinomas and malignant melanoma while they were eating lunch. Given this context, we were not so concerned about the speaker's poor rating from the site coordinator.

Exhibit 9.4 gives a sample Year-End Summary Report of a speakers bureau.

DESIGNING AN EVALUATION PROGRAM FOR YOUR SPEAKERS BUREAU

Keeping these general principles in mind, at some point you should be able to put into place some systematic evaluation components of your speakers bureau. We have given you some examples of evaluation tools in this manual. Whether you are evaluating one or several components of your program, here are some general steps to follow in program evaluation.

1. **Establish an Evaluation Mindset:** This step is essentially reviewing much of the material discussed in this section of the manual. As a program manager you are used to being *output* and *action* oriented. Before starting the evaluation planning and design process, make sure you shift to an *objective,* step-back-and-look, open minded posture.
2. **Identify the Outcomes that You Wish To, and Can, Measure:** Recall that outcomes are benefits for participants during and after your program implementation

Exhibit 9.4

Year-end Evaluation Summary

Number of requests received in the past year: _____ Percentage fulfilled: _____%
Number of organizations reached in the past 12 months: ______
Number of organizations with repeat requests ______
Number of individuals reached: ______

Diversity of audiences

Percentage	Race/Ethnic	Percentage	Topic
	Caucasian		Senior Citizen
	African Am./Black		Professional
	Hispanic/Latino		Youth
	Asian		Worksite
	Other		Community

Topics most often request:

Percentage	Topic	Percentage	Topic
	Lung Cancer		Breast Cancer
	Prostate Cancer		Colo-rectal Cancer
	Smoking Cessation		Navigating the cancer.gov website
	Clinical Trials		Overview—Cancer Information Service

Total number of speakers in the Bureau: _____
Percent who participated this year ____%
Number of requests generated by outlet:
______ Mailings
______ On-line requests via home Web Page
______ Newsprint (PSA) ______
______ Articles highlighting the following study findings and promoting speakers (list)
______ Media events utilizing members of the speakers bureau:
______ Personal contact
______ Other

Qualitative Summary: (Write concerns, challenges, and positive comments for the year)

3. **Determine what Indicators Would Explain Any Outcomes**
4. **Decide How Best to Collect Information on These Indicators**
5. **Analyze and Interpret the Information that You Collected**
6. **Report Your Findings and Conclusions to Your Users of the Information**
7. **Respond to Recommendations and Make Adjustments to Your Program**

BALANCING SYSTEMATIC AND INFORMAL EVALUATIONS

While we have stressed in this manual the importance of having systems in place, we do not want to undervalue the use of informal evaluations that those involved with your public speaker bureau can provide for you. Those close to the program have intimate, candid and realistic, while subjective, impressions of your speakers bureau. They can provide good qualitative information about your program. However, it is rare that only these types of evaluations will suffice for an organization.

We recall a Board member asking a direct question to us about how our speakers bureau was *"doing."* Without hesitation, we recounted quite confidently and in much detail the process of our public speaker bureau: how it was organized and delivered, how it was used, and who was using the service. Essentially, we were giving him a detailed formative evaluation report. After we finished, the board member responded: "I asked you how it was doing; how effective was it? Not how it worked and how much of it you were doing." With some hesitation we answered, "We don't know." The next day we started a serious evaluation plan for our program. Our executive director often noted to the program managers that he felt we made sincere attempts at evaluations but when all was said and done we were measuring our business.

It is important to put into place, at some level, systematic evaluation components both formative and summative, if possible, that measure how well your program is doing. Monitor the progress of the evaluations. Use the reports and be an advocate for changes that could improve the program. It is good to experiment, but experiments work best within good evaluation systems. Evaluation can be a daunting task because it can be rigorous and ultimately should be never ending. You can balance this with a "There has to be a better mouse trap" mentality. Program improvement can be exciting and satisfying, especially if the changes that you make are based on information that you discovered from some sound evaluation.

CHAPTER TEN

Summary and Final Tips for Success

The adage "anything worth doing is worth doing right" is a good advice to health and human services groups who wish to offer a public speaker bureau service. Now that you have completed this book and have learned the essential elements and identified some pitfalls of managing a public speaker bureau, you should be on the right track in providing a useful and quality educational service to your constituents and the communities you serve. These groups will, in turn, reward you once they see through this service that your organization is worthy of their support.

Identifying the purpose of your speaker bureau is not only valuable, because it is fundamental, but it serves as the driving force for many of the decisions that you make while offering this educational service. You owe it to your organization to take the time, up front, to identify the real purpose or purposes of the bureau. The purpose should be related to the mission of the organization and, more specifically, have an impact on current organizational objectives. If the organization supports this program (e.g., resources, staff, volunteer time), then the program deserves to give back something of value to the organization. The purpose of the speaker bureau will *drive* many of the decisions you will make while developing this service, such as:

- What topics should we offer?
- What audiences do we want to hear our messages?
- What types of speakers should be recruited?
- What do these speakers need to know?
- How should we design a training program?
- What are the appropriate teaching tools for the speakers?
- What materials should we leave behind for our audiences?

- How should we publicize the program?
- How should we craft the evaluations?
- Who should read the evaluation summaries?
- How should we respond to the evaluations?

Depending on where the speakers bureau fits within the core services or strategies of the organization will determine the amount of attention and resources given to **publicizing the program**. Most organizations are not at a loss for ideas on how to publicize its programs and services. However, you have learned through these chapters some good tips on how to publicize your speakers bureau. They range from making sure the speakers know to publicize the bureau via *word of mouth,* to promoting the speakers bureau via many day-to-day activities of the organization. We called this *"What else?"* marketing, because we should get everyone in the organization in the habit of asking our customers: "What else can we do for you today?" All publicity materials should be first and foremost "clean," then you can move to "creative." The advent of the Internet has opened not only new avenues, but literally large highways for where and how you publicize the speakers bureau. Today, you are not locked into the obligatory brochure, but have an expanse of ways to publicize your speaker bureau service. Regardless of the chosen medium, keep in mind these tips for the presentation of publicity materials. Make sure the promotional piece:

- Uses a unique identifier of your organization
- Is aesthetically attractive
- Has a benefits statement
- Lists the topics from which to choose
- Has a response mechanism for contacting you
- Delineates basic procedures, policies, and conditions for using the service
- Gives a call to action to use your speakers bureau

As a program manager of a speakers bureau, don't get lulled into thinking that the public relations or marketing staff have sole responsibility for publicizing this service. Organizations will have various approaches and levels of enthusiasm to how the speakers bureau will be promoted, if at all. In the end, if the program is not attracting users, it will be your loss. We should remind ourselves that if programs are not meeting expected reach, it is not the marketing or public relations staff at risk in the job, but usually those who have ultimate responsibility for managing the program. You are the biggest stakeholder in seeing that the speakers bureau is promoted to your constituents.

We have given you some basic ideas on how to promote your public speaker bureau service. Use all of the tools and methods at your disposal and be thankful for what your organization is willing to give you. You can be creative when publicizing your service. Promoting your speakers bureau can be in various forms. Remind yourself of the purpose of the speakers bureau and the target audiences and the promotion ideas should begin to flow. Taking a good look at purpose and audience should keep you on target for promoting the service.

Your speakers are your most valuable assets to this program. By design, this book has focused on systems and best practices for managing a speakers bureau. It has been very *process focused* to minimize risks and try to ensure a favorable experience for all involved in the speakers bureau. However, we know that if your speakers are not of good quality, there is little that can be done to *pull up* the program. Get your speakers bureau off to a good start by **recruiting the appropriate speakers** into your program. You are looking for speakers who have:

- subject matter expertise
- knowledge about your organization
- commitment to your organization
- podium presence for talking in front of groups
- willingness to accept direction and training offered by your organization
- reliability—They show up!
- good interpersonal skills to work with your staff and the audiences' site coordinators
- flexibility to adapt to problems that invariably occur in the field
- willingness to read and respond to their evaluations

Speakers should not simply be self-selected or sent to your speakers bureau by staff and others simply for involvement. The speakers bureau is much more important than that. Having good speakers on your speakers bureau is most rewarding, and you will be looking forward to giving them the appropriate "thank you's "and rewards as they well represent the purpose of the speakers bureau and the mission of your organization.

Even the best subject matter experts and best presenters on your speakers bureau need and deserve quality **speaker orientation and training** to be successful on your public speaker bureau. You have read in this book that, generally, speaker training is about a) establishing a good relationship between your speakers and the program; b) providing formal and up-to-date training; and c) ongoing process that deserves your attention.

Speaker orientation and training begins at the first encounter with prospective speakers and continues for the life of their involvement with your program. It is a rewarding part of managing a speaker bureau and can be the most interesting part of the program. Recall that speakers need training, skill building, and information in these general areas:

- Information on subject mattes in the bureau
- Use of educational tools
- Public speaking techniques
- Logistics on how to be a successful speaker in the field and for your organization
- The evaluation process

In this book we looked at a number of tools to help with speaker orientation and training. As any important job needs, we looked at a sample *speaker bureau job description* to let the speakers know what is expected of them. Orientation starts with informal encounters and interviews that you have with prospective and new speakers and grows to well-planned and structured training sessions that need to be offered. You know not to underestimate the value of speaker orientation and training, even with your most experienced volunteers and long-time speakers. Speakers will be thankful that you warned and coached them about the pitfalls and logistics in the field—you know that there are many. Your evaluation process should give you enough information to keep your trainings fresh, and there will often be changing objectives and priorities in the organization that require you to update your speakers. Everyone benefits from a good speaker orientation and training plan. This should help ensure that everyone has a good experience with your public speaker bureau service.

While the words coordinator, coordination, and coordinating are used quite often in our work, don't be jaded by these terms. One of our aims in this manual was to have you appreciate the true **coordination** that needs to take place when managing any type of speakers bureau service. We suggest taking one of Murphy's Laws seriously, *What can go wrong, will go wrong,* and develop a risk averse attitude toward managing the speakers bureau. Good coordination in managing a speakers bureau takes place when you have clear flow of information from the beginning of the request; the ability to capture and react to changing information and needs in a speaker request; and establish a healthy and productive relationship with the group's site coordinator. We suggested that you set up a system to retrieve and continue to retrieve reliable and accurate information that meets your customers' speaker requests—when they want it and under quality conditions. Successfully managing a public speakers bureau calls for excellent coordinating skills. Anything short of this from those responsible for your organization's speakers bureau usually leads to problems. We are so convinced of this that we warn organizations not to sponsor a public speakers bureau unless they are committed to good oversight of the program. This book gave many helpful tips in coordinating the speakers bureau program.

Securing a speaker for a speaking engagement is time consuming—even exhausting. Anyone who has managed a speakers bureau knows the sick feeling that comes as each day passes and you have not secured a speaker for an organization or an event. We found it to be a real sense of failure, and felt discomforted that we let our agency down. Often it is not due to a lack of effort. We have outlined and delineated in this book an efficient and effective system for securing a speaker for a speaking engagement that should ensure success in meeting the demands of program offerings.

It starts with a good *speaker request intake system* that feeds information onto a *speaker recruitment/assignment calendar.* We gave tips on how to get a "blast call for speakers" out to your members. We gave samples of confirmation letters to show how speakers can be assigned to a speaking engagement with little confusion and effort. What once was a laborious and time-consuming process can be almost a routine ask. This frees up your time to spend on the difficult requests or trouble shoot changes in requests. We outlined how a speaker can be assigned, confirmed, and sent to a speaking engagement with accurate and useful information. We showed how everyone involved in the speaking engagement could be working from the same sheet of information. After all, little is gained if you don't get the appropriate speaker in front of the right audience, at the correct location and during the right date and time, to deliver the appropriate messages. Confirming a speaker is hardly a simple arrangement and agreement. You need to consummate the arrangement with detailed, accurate and unequivocal information. We offered critical success factors for the time/date/and place information that increases the chances of our speaker arriving at the site. These systems help work against another one of Murphy's Laws that "What has the risk of being misunderstood will be misunderstood."

Our mantra for program management is "If the program was not evaluated, it did not happen." In the next to final chapter of the book, we discussed the importance of **evaluating your public speaker bureau**. We noted that all involved with the speakers bureau should have an opportunity to evaluate the quality of the service and the experience with your agency. We know that quality program evaluation can be an involved undertaking and is often accomplished by well-trained and experienced professionals. However, we explained and gave sample tools for basic evaluation of a public speaker bureau.

Evaluation generally falls into two main categories: *formative evaluation*, which covers the process and implementation of the program; and *summative evaluation*, which looks at outcomes, and impact of a program. We discussed that in most cases it is difficult to collect summative evaluations from our audiences because a speakers bureau presentation is an episodic intervention given to an audience that we will not have access to over a period of time to test knowledge, perception, attitudinal, or behavioral change. We realize that a speakers bureau my be one of several interventions or services which aim to make a difference. Therefore, it is even more critical to ensure that the processes and implementation of the speakers bureau are investigated. The audience, even if reported via the site coordinator, should have an opportunity to evaluate:

- program objectives
- speaker effectiveness
- speaker's style
- audio visuals
- handouts
- environment for learning
- satisfaction with the program
- experience with your organization

The site coordinator should have an opportunity to evaluate the speaker and the overall presentation. And the speaker should have an opportunity to evaluate their experience at the site. Items to evaluate ranged from simple items such as, Did the program keep to the schedule? to the program meeting expectations, to the overall experience with the organization offering the program. All constituents should have an opportunity to evaluate their overall experience when working with your organization. It is important for your constituents to not only feel that your programs have value, but that they feel that they had a good experience while interacting with your agency. The *organizational experience* is often overlooked in program evaluations.

In planning the evaluation schemes, we discussed the popular thinking in this field that it is essential to know who will use the information gained from the evaluations and for what purpose. This is called ***utilization review evaluation.***

In designing an evaluation program, we outlined general steps to take—starting with establishing an *evaluation mindset.* Once you determine what outcomes need to be evaluated, you can design tools and ways to collect data. After you analyze and interpret data, don't forget to report the data, especially to those who can use this information and are willing to respond by making recommendations or changes to the program.

There needs to be *continuous evaluation and improvement* of your public speaker bureau. We have stressed in this manual the importance of having systems in place; however, we do not undervalue the use of the *informal evaluations* from those closest to the program. As the coordinator of the speakers bureau, you play the key role in providing leadership in monitoring, evaluating, and responding to needed changes to your speakers bureau.

By working through the many steps, activities, and suggestions in this public speaker bureau manual, your program should show a marked improvement. If you are beginning to design a new speakers bureau program, we hope that we have given you the essential elements to get you on your way to a purposefully driven, efficient, and effective speakers bureau. On the one hand, managing a speakers bureau is more involved and demands more attention than most program mangers know. However, with these essential elements in place, combined with an appreciation for the pitfalls in the field, you should be able to get a public speaker bureau up and running smoothly in no time at all.

When you offer a high quality speakers bureau, the rewards to your organization will be great; for you will demonstrate to your constituents that your mission and your organization is worthy of their support!

All men by nature desire to know.
(Aristotle on Metaphysics, Book I)

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