# Workshop Organisation Checklist

*This document is an amalgamation of several internal (DANS[[1]](#footnote-0), CESSDA[[2]](#footnote-1)) and public (SSHOC[[3]](#footnote-2)) checklists.*

**NB: Please download or copy this checklist to your own Google Drive rather than using this version**

## Introduction

There are two different checklists in this guide: a [Table](#o4eiugc21r22) and a [Narrative](#xj05yy532yl9). You can pick your preferred style, both can be used together (there is some overlap), or you can combine the elements into your own checklist.

*Note: these checklists were mainly designed for online events. For in-person events, make sure to insert additional aspects such as location bookings, catering, accessibility, and logistics.*

Finally, after you read through this guide, be sure to check out the SSHOC Online Train-The-Trainer guide:

“BRINGING WORKSHOPS/TRAINING ONLINE SSHOC Train-The-Trainer Bootcamp for Librarians”. Yankelevich, Tanya, Fiser, Darja, Lenardic, Jakob, Gorgaini, Elisa, & Braukmann, Ricarda. (2020, June 24). LIBER 2020 - Workshop: SSHOC Train-the-Trainer Bootcamp for Librarians. Zenodo. <https://doi.org/10.5281/zenodo.3970799>.

There you will find another checklist that you may find suitable as well as a large list of resources for giving online trainings

## Table Checklist

This style of checklist is useful for dividing work between individuals, as well as advance planning and timing considerations. There are three sub-checklists: Prior to the event, On the day of the event, and After the event. There are designated roles as well.

***Roles in the event process (that can be redistributed, split up, or combined across people involved):***

- **Organise (O)** are the tasks for organising the event. They may also serve as a speaker or moderator, but are not required to do so. The O is responsible for creating a detailed event script and defining the roles and responsibilities of all participants.

- **Facilitate (F)** are the technical aspects of an event that need to be (e.g., registration, technical support at events), as well as physical location bookings as necessary.

- **Communicate (C)** are to be sorted out with the communications team at your institution, whether that is a single person or a team outside of your department. The C makes sure to pass on everything that the communications team needs to post items to the right places at the right times. Depending on your organisation, this can include Twitter, LinkedIn, YouTube, Instagram, or other social media networks, as well as items to be added to an organisation’s website, newsletter, or agenda. This person is also responsible for external contacts, such as other organisations involved in the event. If this is taken care of by a communications liaison within your organisation, ask them what timings and points they need and you can replace them within the table as necessary.

### PRIOR TO THE EVENT

|  | **Organise (O)** | **Facilitate (F)** | **Communicate (C)** |
| --- | --- | --- | --- |
| **8 WEEKS PRIOR** | * Check if the date is free in your organisation’s calendar, and check against lists of state-recognised holidays. | * Create a folder structure for organisers to work in (e.g. link the current presentation template, logos, event report template, and other documents). * Arrange any in-person elements that are necessary (such as room or catering bookings) | * Reserve the date according to organisation’s practice |
| **7-6 WEEKS PRIOR** | * Begin preparing documentation in the folder provided by C: * Description of event (title, date, abstract, tentative agenda, speakers, reading materials etc.) * *\*\*If slides and recording(s) will be publicly available, all speakers need to consent with this in advance.* | * Schedule and arrange the meeting with O and agree on:   + Platform for online meeting and any necessary settings (e.g. Zoom, Google Meet, Teams, etc.)   + Who will be the technical lead for the day itself   + Admin of online meeting platform (e.g. passwords, institutional access) |  |
| **5 WEEKS PRIOR** | * Prepare promotional text * Share promotional text with C * Promote the event on your own (social) networks, and project specific sites * Ask speakers to promote the event as well | * Promote the event * Forward promotional text and other info about the event to C. | * Post the “Save the date” with some general information (e.g. Organisation’s website, Twitter, LinkedIn, project Newsletter) |
| **4-3 WEEKS PRIOR** | **Gather more information**   * Bios, pictures, e-mails, ORCID of the speakers - Tags of social accounts/names of organisation and speakers, Final agenda with schedule * Any other important information about the event * Assign people to the prescribed roles[[4]](#footnote-3) * Agree with speakers, F, and C on the test run session. * Inform speakers of the deadline for presentations (with presentation template and requirements) | * Send new information to the C. * Arrange a date for a test run with O, C, and speakers * Ask panellists to register if necessary for organisation or online platform * Determine how closed captions/subtitles will be implemented * How to provide material to attendees in advance who need it (e.g. via email, or registration) | * Update info about the event. |
| **2 WEEKS PRIOR** | * Prepare the introductory slide (with DOI or other PID from Zenodo via C) | * Send information about the Zenodo file to C. * Prepare an evaluation form (F and O) and agree on the platform (e. g., Zoom pool or Zoom exit questions, online survey) | * Active Promotional campaign in all media. Intensity depends on the number of registered participants. * Reserve a DOI identifier in Zenodo. |
| **ADDITIONAL PROMOTION[[5]](#footnote-4)** in case of low number of registrations. | **ADDITIONAL PROMOTION**  Continuous monitoring of registration and informing C and O. |  |
| **1 WEEK PRIOR** |  | * Suggest O to use different engagement tools during the event (Mentimeter, Sli.do) * Agree with O who will record the event (F or another facilitator). | * Tweet |
| * Prepare a detailed script for the event, with clear roles. Be present during the test run. * Gather links to share during a live event. | * A test run of the webinar:   *(all speakers and moderators)*   * + Technical advice   + General information   + Test screen sharing, audio, and video. |  |
| **3-2 DAYS PRIOR** | * Make sure you have FINAL SLIDES from all speakers | * Export any questions from the registration form and share with presenters/panellists. | * Tweet reminder |
| **1 DAY PRIOR** |  | * Final check to see if any new questions have been received from registration. * Verify that the evaluation survey is in order. * Send reminders to all registered participants (automatic reminders for Zoom webinars go out 1 week, 1 day, and 1 hour before the event starts; for Zoom meetings, this must be done manually). | * Tweet reminder |

### ON THE DAY OF THE EVENT

|  | **Organise (O)** | **Facilitate (F)** | **Communicate (C)** |
| --- | --- | --- | --- |
| **30 -20 MINUTES PRIOR** | All speakers/moderator/facilitator meet in the event room (practice mode)**:**   * sound and mic check * screen share check - share the first slide * CF prepares break out rooms if necessary * Confirm who (at least 2 people) will be recording the event. | |  |
| **EVENT STARTS** | Inform attendees about technical and consent matters[[6]](#footnote-5):   * inform about recording * how to ask questions/a hand raise option * where the webinar will be posted (website) * how to fill out the evaluation survey * etc. | * Start recording the event. | * Live tweeting if C is present and if necessary/possible. Otherwise, schedule a tweet for the beginning. |
| **DURING THE EVENT** | * Copy relevant link(s) from the presentation into the chat so the attendees can follow the presenter as they go. | * Monitor participants (e. g., let people into the room, mute participants if it is too loud) |
| **AT THE END OF THE EVENT** |  | * Share evaluation survey (e.g. via Zoom, other platforms).   **Export from Zoom Immediately after the event** (to avoid data loss):   * list of attendees * Q&A report * Chat * **Recoding** - convert and make copy * Copy materials to the appropriate online/ offline folders. |  |

### AFTER THE EVENT

*Information on materials should be posted no later than 7 days after the event (in consultation with participants).*

|  | **Organise (O)** | **Facilitate (F)** | **Communicate (C)** |
| --- | --- | --- | --- |
| **1-2 DAYS AFTER** | * Finalise the slides - minor updates. * If desired by C, prepare and share a news story about the event with C | * Clean up the recording as desired (silent spots, other issues). |  |
| **3-5 DAYS AFTER** |  | * Send the recording, slides, and other materials to C for the Zenodo | * Publish the recording and materials on the appropriate platforms (Organisation website,, Zenodo, etc.) |
| **6 DAYS AFTER** |  | Prepare an email notification[[7]](#footnote-6) (to all attendees and absentees), including:   * Link to published materials (or newsitem) * *Reminder to fill in the evaluation survey.* | * Publish and promote the news story with the link to the published materials on the organisation website |

## 

## Narrative Checklist

This style checklist is more aimed at figuring out what information is important to collect, and having it all in one place. The benefit of this checklist is thinking of the elements that lead to an event and what is necessary for the planning.

## [Name of event]

### 1 - General Information

**Date:**

**Time:**

**Contact Person:** *Either the person participants can get in contact with, or the person from the organising committee that the people planning this event have contact with*

**Registration link:** *If applicable*

**Location / Link:** *Select the meeting link you will be using for this event*

* **ZOOM:**
  + **[Event]:** [url]

Meeting ID:

Passcode:

* Other, namely: ...

**Invitation text:** *Here, you can draft the announcement for the event.*

* When + Where will the announcement be posted?

### 2 - Objective

**Context of the event:** *Describe which project/work package/task/initiative/collaboration is the organiser of the event. If applicable, link to relevant other websites, documents, or materials.*

**Key objectives:** *Describe the main objectives of this event*

* **Keywords:** *List the most important keywords for this event*

**Audience:** *Who will participate in this event? Specific parties/stakeholders/people? Any prerequisites? Will they be specifically invited, or is the event open for all those interested? Is there a maximum number of participants or can you make an estimation of the number of attendees?*

**Advertising:** *How will you be advertising the event? Is this via a communications team at your organisation, or one of the organisers of the event? What elements need to be prepared for the communication team at your organisation? What timing is important?*

**Present from organiser:** *List who will be present from the organising party/parties. Do they need to register for the event as an attendee/presenter?*

### 3 - Agenda

*NB: If the event takes place over a span of multiple days, you can copy this table to fill out separately for each day.*

**Duration:** *[XXX]*

**Agenda**

| **Time slot** | **Activity** | **Chair(s) / Speaker(s)** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### 4 - Technical and Organisational aspects

**Technical assistance:** *Will you need (external) technical assistance? How will you organise this? E.g., zoom polls that need to be launched, chat and/or Q&A that needs to be moderated, or other housekeeping announcements. Will there be support for closed captions/subtitles?*

**Presentation(s):** *Link to the presentation slides. If multiple presentations, will they be separate files or collated into one? Will they be shared in advance of the event so that participants have advance access as needed? Who will control the slides during the event?*

**Breakout rooms:** *Will you be using breakout rooms? For what purpose? What topics/themes will be discussed? If applicable, link to presentation slides, discussion forms, note taking documents, or other materials that will be used.*

**Recording:** *Will photos or recordings be made? For what purpose? Will they become (publicly) available? How will you let the audience know? Will the chat be saved for later use? Do you need a photo release form or recording permission?*

**Minutes/notes:** *If applicable, link the file used for logging minutes / keeping notes during the presentation/breakout sessions. Will it be a collaborative document open to attendees or a closed one for internal use only? Tip: You can also put some texts/links here that you know you’ll want to share with attendees, so you have them handy to copy-paste into the chat.*

**Prerequisites for participants**: *Is there anything participants could / need to prepare or take a look at before the event (e.g., reading materials, tools, a survey)? How to address accessibility needs?*

### 5 - Post-event outputs

*List which post-events outputs you are planning to put out and where these will become available.*

*For example:*

* *Presentation slides and other materials (mailed to participants? posted online?)*
* *Any other outputs promised during the event*
* *Post-event blog*
* *...*

### 6 - Actions / Responsibilities

*List what actions need to be taken, by whom, and when. Some examples currently listed in the table below. You can also add a column to communicate the status of the action (e.g., pending/done).*

| **What** | **Who** *(+ When)* |
| --- | --- |
| *Draft invitation/announcement* |  |
| *Other pre-event communication* |  |
| *Create materials needed* |  |
| *Arrange necessary (technical) support* |  |
| *Post-event outputs* |  |
| *...* |  |
| *...* |  |

1. DANS is the Dutch national Service provider of CESSDA: <https://dans.knaw.nl/en> [↑](#footnote-ref-0)
2. CESSDA - Consortium of European Social Science Data Archives: <https://www.cessda.eu/> [↑](#footnote-ref-1)
3. SSHOC - Social Sciences and Humanities Open Cluster: <https://www.sshopencloud.eu/> [↑](#footnote-ref-2)
4. Roles could be: moderator, technical facilitator, note keeper, speakers and other panellists. [↑](#footnote-ref-3)
5. Keep in mind that the target number of participants may vary depending on the topic – about 50 participants should attend the webinar (i.e. at least 100 people should register). If this number is not reached, the promotion should be intensified (extended to more organisations and colleagues). [↑](#footnote-ref-4)
6. One method is to create a house rules slide that can be standard for your organisation. [↑](#footnote-ref-5)
7. Via Zoom or via email by the facilitator. [↑](#footnote-ref-6)