Event Organisation Guide Documentation

Release 1.1.1 beta 1

Shoaib Sufi, Selina Aragon, Aleksandra Nenadic

Jul 17, 2020

Contents:

1 Introduction 1

2 Events are Projects 3

3 When to Start Planning 5

4 Idea Exploration Stage (IES) 7

5 Feasibility Stage (FS) 9

6 Event Project Stage (EPS) 11

7 About 27

CHAPTER 1

Introduction

Welcome to the Software Sustainability Institute's Event Organisation Guide (SSI-EOG or EOG for short). The Institute has built up a large amount of experience organising events, ranging from a few to around 100 attendees. Our Collaborations Workshop (CW) series is an example of one of our larger and more complex events. The CW series combine audience-led sessions in the style of an 'unconference' and traditional workshop sessions. CW has around 80-100 attendees and there is no call for papers but a call for mini-workshops.

This guide goes through the steps of organising an event and is structured around the way the Institute organises its workshops and events.

CHAPTER 2

Events are Projects

Events are projects, so the stages in a project also apply to an event. In fact, there are some stages around the running of the events which are of particular importance to give the event context and buy-in from other stakeholders.

In the following sections, we detail the stages of an event to help understand what is needed for each stage.

CHAPTER 3

When to Start Planning

For events such as a Collaborations Workshop, it's important that the idea and feasibility stages start early – anywhere from 9 to 12 months before the event – to allow enough time for promotion, calls for sponsorship, registration, calls for participation, and to get the date into your target audience's diaries early before other events are announced.

For smaller events or workshops, e.g. Software and Data Carpentry, 3–6 months are normally enough.

For online webinar type events, 1–2 months is enough time.

CHAPTER 4

Idea Exploration Stage (IES)

At this stage, the event is just an idea. The idea is explored further to see if more investigation is warranted to perform a formal Feasibility Stage (FS), which comes next.

An overall goal and aim should crystallise by the end of the IES stage, but this is more formally detailed as part of the FS stage. Think about the target audience before deciding on the goals and aims of the event. An initial understanding of who the audience will be defined at this stage - i.e. which section of the a particular community are you targeting by running this event. This is paramount to develop the next stages of the event: what sessions to run, type of content for each session, publicity, and outputs.

This is also the stage at which the financial parameters should be agreed. For example, will the event make a profit, break even, run as a free event, or is it allowed to make a loss? If the event is allowed to make a financial loss (e.g. a pump-priming event), then the limits of that loss need to be agreed.

One should also agree on maximum number of attendees at the event as this impacts on venue choices and requirements in the Feasibility Stage.

Even at the Idea Exploration Stage, it should be possible to discuss the balance of the type or combination of types of sessions throughout the event in terms of:

- Informing (e.g. speakers)
- Exploring (e.g. discussion session)
- Creating (e.g. Hackdays, Bring Your Own Data (BYOD))
- Learning (e.g. Software Carpentry (SWC)/Data Carpentry (DC) or other instructive approaches)
- Networking (e.g. lunch/coffee and other social sessions)

If this stage is approved, an *Event Lead* (EL) should be identified to manage the vision and delivery of the event, and effort from others should be assigned to form a co-ordinating group during the FS stage. For smaller events, only the EL may be required.

The EL should ideally have experience organising events. If they do not, then they should have a mentor assigned so they can learn as they go along. The mentor and the main stakeholder do not have to be the same person and often won't be.

The EL is answerable to the stakeholders - if there is more than one stakeholder, there should be a *Lead Stakeholder* (LS) who can make the final decisions.

CHAPTER 5

Feasibility Stage (FS)

The Feasibility Stage (FS) comes after the *Idea Exploration Stage (IES)* stage is signed off by all necessary stakeholders. Now, the event idea is being explored more thoroughly. The FS is akin to a pre-planning or early-planning stage. At this stage, various things are needed before a formal sign-off and progression to the *Event Project Stage (EPS)* (i.e. before the Institute/the main stakeholder agrees to take on the staff effort, financial risk and opportunities afforded by running the event).

This is a list of information from the FS which is needed for evaluation by stakeholders. Successful evaluation will move us into the EPS stage:

- **Goals & objectives**
    - What we hope to achieve by running the event (goals) and a set of measurable steps towards achieving our goals (objectives).
- **The audience**
    - Which groups of people you are planning the event for helps set the goals and objectives in context.
    - Consider your target audience's career stage, geographic location, gender, ethnicity, job roles, organisation types (e.g. funders, publishers, researchers, administrators).
    - **Prioritising the audience might also help with refining goals and keeping planning on target. If the priority chan**
        - Although if this does happen, the Lead Stakeholder should probably be consulted to make sure it's OK to carry on if you are in the EPS stage.
- **A date**
    - The date needs to fit into the calendar of other events that are likely to affect the target audience.
    - **The event should be at a time when accommodation is available. Things to consider here may include:**
        - Being outside of University term time,
        - No other conflicting local events (e.g. football matches) as they tend to raise accommodation prices,

    * Preferably not clashing with primary/high school holidays.

- **A venue (see an example venue specification)**
    - A specification of venue requirements should be put together.
    - **Visits should be carried out before hiring a venue.**
        * Having an agent local to the event at hand can help a lot when the event is remote to your location.
    - The venue should be checked for availability for the preferred dates.
    - A possible venue should be chosen (or a few choices shortlisted).
- **A budget (see a budget example)**
    - These should show estimated income lines, and estimated outgoing costs lines.
    - Best case, middle case and worst case cost projections should also be prepared.
- **Outputs and outcomes (what's the difference)**
    - These should be linked to the event goals.
    - Some of these will be the same as the objectives of the workshop.
    - They should include the type of resources that will be available after the event. That is, whether a report will be written, videos of the sessions or any other resources will be made available.

5.1 Assessment

Once collected, the above set of information will need to be assessed by the stakeholders (or the Lead Stakeholder). The assessment should have one of the following outcomes:

- **Proceed** - the EL can now arrange the event.
- **More work needed** - More detail might be needed for some aspects of the event before getting final approval (e.g. re-visit the budget).
- **Reject** - it might be decided that it is not worth running the event (this should be rare at this stage as most things should be caught at the less expensive IES stage discussions).

CHAPTER 6

Event Project Stage (EPS)

The idea was accepted and the constraints and practicalities have been signed off. Now we are in the Event Project Stage (EPS) - it's time to organise the event itself.

The EL needs to think about infrastructure, setting a timeline, committees and roles needed in the run-up to the event, the details of the agenda, publicity, how to go about attracting sponsorship, catering, event roles on the day and even how to close down the event.

The following sections go into these elements of the project in more detail and give advice on how they should be developed.

6.1 Infrastructure

There are a number of different systems which are useful for organising events which an EL may want to use.

To manage event registration, the Eventbrite system is very useful. There is a fee for paid events (that's how the system is supported); for free events there is no fee. You can add custom questions, export registrations to another system, e.g. Google Drive Sheets (or Excel, LibreOffice Calc), to help see how people have answered questions about participation or catering requirements to help with further planning. It has an integrated email system so reminders can be sent to people before they attend, e.g. what they should bring along such as laptops. In terms of payment, there is also an option to allow participants to request invoices, as well as raising invoices at the organisational side so it can add to overheads. This option can be essential for allowing certain groups to attend; however, extra effort is needed to keep track of these and chase these up with reminders.

The Institute has its own website (www.software.ac.uk) which runs on the Drupal content management system. Although information can be placed on the Eventbrite system about the agenda, accomodation options, guidance and other matters relating to the event, it is better to have these on a dedicated website. GitHub, via GitHub Pages allows the ability to setup a website and may be useful for setting up an adhoc event where access to existing website infrastructure or a content management system is not available.

If your organisation has a list of people who have signed up to hear news or you have permission to contact them after a previous event, then an excellent system to use for promoting to them could be an email marketing system. An example of this is the Mailchimp system which allows the creation of named lists of email addresses and scheduled mailshots amongst other features (e.g. integration with Eventbrite). Sometimes the personal touch maybe better and a named person emailing to a list maybe more effective.

Contacting sponsors individually and having one person emailing them gives better results. Those responsible for first contact with potential sponsors can be different from those who take over the conversation if sponsors show interest.

Another example of organisational tools are those that help support scheduling; e.g. for talk orders or reviewers or collaboration groups where certain constraint combinations (role, gender, domain or career stage) are used. Doing this completely by hand could be tedious, so Python libraries for handling data, such as Pandas, and linear modelling libraries, such as PuLP - could be helpful to create an initial configuration of people which you can then manually tweak, thus saving a lot of time.

6.2 Timeline

It's important to think about a timeline for the project as soon as it has been confirmed. An outline draft and a deeper draft at the IES and FS stages would be useful but one should not get bogged down in detail.

In the EPS, a detailed timeline will be needed and should be revised and updated as the project goes on to reflect changes.

An example timeline is available to give a holistic view of some of the considerations in this area.

6.3 Budget

It is important to think about the budget very early on and have a budget outline ready in the *Feasibility Stage (FS)* for the perusal of the (main) stakeholder(s). Such an outline should contain estimated income and outcome lines, as can be seen in an example budget. In the early stages, you should focus on the budget lines that are absolutely necessary and essential for the event to be delivered, for example:

- estimates for the venue hire and catering
- keynote speaker fees, travel and accommodation estimates (if applicable)
- prizes estimate (e.g. for best paper, best poster, best hack-day idea)
- hiring of poster boards (if you are hosting a poster session)
- lanyards & badges
- printing programmes (unless you are going paperless)
- expected income from registrations
- expected income from sponsors (may be an unknown at this stage, unless you already have some sponsors confirmed)

Because at this stage you can only estimate, you should prepare the best case, middle case and worst case cost projections. Try and get actual quotes for as many of the above items as possible, as it will make it easier to plan the budget and will give you more accurate figures. For example, at this stage you may already have a few quotes from different venues but may be less able to estimate the fees and travel costs for your keynote speakers as you do not know where they will be coming from. In this case, you may decide to put an upper limit on those costs which would also count as your worst case cost projection and will also limit you in your keynote search (e.g. you may decide that you can only afford speakers from the UK or Europe).

You should also estimate a number of optional costs, which you can decide to incur should you attract enough sponsorship, for example:

- conference dinner

- drinks with conference dinner
- conference dinner entertainment
- registration fee waiver for the members of the organising committee
- T-shirts for the members of the organising team and local volunteers (to make them stand out from the rest of the audience)
- conference pack
- better food options
- childcare

As you move into the *Event Project Stage (EPS)*, you will refine and update your budget periodically with the actual costs (e.g. when you sign the contract with the venue or book travel for your speakers) or income (e.g. as registrations start coming in) and make decisions on optional/additional costs.

6.4 Committees

Committees are great ways to shape the event's programme and get help with logistics, while giving people credit for taking part.

As an example for the CW series, there are two committees which offer different types of help and advice.

- **A steering/programme committee**
    - Help with the agenda
    - Direction of the workshop
    - Publicity contacts
    - Keynote suggestions
    - Ideas for sponsors
    - Review of contributions or managing reviews of contributions if you have a different set of reviewers (e.g. for mini workshops in the case of CW).
- **An organising committee**
    - Focused on logistics (e.g. who will serve the special meals)
    - Identifying roles at the event (e.g. social media event amplifier)

Different types and sizes of workshops will need different committees, roles and responsibilities.

The EL should decide what type, number, size and complexity of committees are needed for the workshop.

There is useful guidance available for larger conferences and committee roles published by the IEEE. For training focused workshops, The Carpentries offer some advice. The Research Software Engineers annual conference attracts 300+ attendees and offers excellent information on the place of committees in the conference and *details of what committee roles entail <https://rse.ac.uk/conf2019/get-involved/>*.

Once the EL decides on the committees, they should recruit members for the roles - they may do this by using a special status (e.g. suitable contacts, sponsors who are willing for the steering committee and local contact who can help with logistics for the organising committee) or they could use a system where people volunteer and a lightweight system of assessment before they are co - opted.

Once committees are organised, the EL has to think of how many meetings to have and for how long they should be held. Each meeting should have at least a few standing items, key items to resolve and actions points from previous meetings, if applicable.

6.5 Agenda

The EL should consider the goals and objectives and the duration of the event to decide the agenda and details such as type and duration of particular sessions. The agenda and reasoning around balance of timings and session types should then be discussed with the steering committee (or equivalent) for comment.

The EL may consider the following types of sessions:

- Informing,
- Exploring,
- Creating,
- Learning,
- Networking.

6.5.1 Informing

This includes sessions that inform and inspire:

- Keynotes,
- Short talks,
- Lightning talks,
- Allowing ad hoc presentations (e.g. additional lightning talks).

6.5.2 Exploring

This includes sessions that aid people working together to explore solutions or identify problems:

- Collaborative ideas or hackday ideas sessions,
- Discussion sessions & speed blogging,
- Q & A panels.

6.5.3 Creating

This includes building things together:

- Hack days,
- Bring your own data sessions,
- Paper/Standards generation.

6.5.4 Teaching

This includes pedagogical sessions:

- Teaching sessions,
- Mini workshops.

6.5.5 Networking

This includes sessions for building relationships between people:

- Around food (e.g. lunch/coffee, conference/workshop dinner, lunch):
  - Protecting these times is important to allow networking to take place.
- Other social programmes:
  - Guided walks or/and
  - Museum or visits to other points of interest nearby.
    - At the end of the day or first thing in the morning can be a good time for these to be scheduled.

6.6 Publicity

Publicity is key if you are to attract your audience to the event and meet your goals and objectives. Not only does publicity occur in the run-up to the event, but it can also take place during an event (e.g. to amplify the effect of the event and bring in voices from outside to the discussions). It can also happen after the event to disseminate outputs and help those who were unable to attend to benefit (and perhaps make them keen to attend future events).

6.6.1 Before the event

Having a publicity plan for an event is vital. As the EL, you will want to reach existing audiences, as well as new audiences or underrepresented groups (e.g. by age, gender, career stage, ethnicity, etc.). The publicity plan should be based on the goals and aims of the event developed as part of the FS.

It is important to investigate dissemination channels and devise a publicity timeline, which references a content plan – the different types of content you will publish throughout the timeline to encourage potential delegates to register for the event. For example, publishing a draft agenda/programme or a call for participation as far in advance as possible will give potential attendees an overview of the event, while keynote speakers will attract different audiences depending on their interests. Sharing experiences from past attendees in the form of blog posts can also encourage people to attend as it might clarify what to expect.

The publicity timeline should fit into the overall event project timeline, and it should include:

- Who to contact (individuals, groups, press offices)
- Contact details (individual email, Twitter, mailing lists)
- Publicity schedule (plan the dates for publishing your event and publicity content)
- Content (news item, blog posts, press release, tweet)
- How to measure the success of your campaigns

Once you have your timeline ready, you can start writing or requesting the content to have it ready for publishing. Different tools (such as Google Analytics, Twitter Analytics) can be used to keep track of visits and link clicks. This is useful to assess if your campaign is working and if people are interested in your content.

6.6.2 During the event

A Twitter hashtag for an event or other social media identifier is a useful way to promote the event to the audience outside of those who are attending or to improve the engagement of those in attendance. You would typically arrange staff or volunteers to be in charge of event amplification via social platforms before and during the event. Note that social media is audience and demographic dependent. Make sure the Twitter hashtag isn't already being used by a different event or programme.

This can stimulate conversation in a space that involves attendees and those who are following along but not attending. If there is a member of staff or volunteer in charge of event amplification, they can also surface some of the outside questions back into the workshop at the appropriate time. It's useful to have a list of pre-prepared tweets ready for the social engagement team to send out on the day at specified times.

If it's possible to stream talks, then this can also aid in promoting the event.

6.6.3 After the event

Communication with attendees after the event in the form of soliciting feedback is useful for further publicity.

After the event, asking attendees for blog posts to talk about their experiences can be a useful way for people who read the news and blog to understand how the event went. It can also form a useful record for future events to help people understand why it might be worthwhile attending your events.

There are various outputs produced at the end of a workshop. For Collaborations Workshops, we normally make available:

- Lightning talks
- Keynote slides
- Hackday entries
- Videos of the talks
- An event report or analysis

These are all good times to publicise the fact that resources from a workshop are now available.

6.7 Sponsorship

Sponsorship for events is becoming more important to help make them affordable. We also attract sponsors to events to, for example, pay for a student to attend or support the attendance of speakers or people outside of the normal remit (e.g. legal staff). This in turn attracts different audiences to the event and raises the profile of the sponsoring organisations. Sponsors offering free t-shirts, software licences or even hardware can also enrich the experience of attendees.

One has to be careful with sponsorship – the balance between in-kind and actual cash is important. Sometimes in-kind sponsorship can help enrich the programme but it does not help your budget.

The EL should use the goals and themes of the workshop to identify which companies might be interested in sponsoring your event.

Create a set of packages for sponsors (e.g. the traditional Bronze, Silver, Gold, Platinum) but also allow for ad hoc sponsorship and be clear about what advantages (e.g. presence on all organiser intro slides) or influence sponsors will have (e.g. a talking slot, a workshop slot, a stand). This will make it easier to approach sponsors.

As mentioned in the section on *Infrastructure*, the task of attracting sponsorship needs to be assigned to the members of the event team. After successful first contact with sponsors by the event team, the EL or designate can then take forward the conversation with those interested in supporting the event.

6.8 Venue

Securing a good venue is one of the most important aspects of the event and can really make a difference between a good and an excellent event. It is also the most expensive line in your *Budget*.

You can have a look in more detail at various venue requirements you should consider in our example venue requirements template document and adjust it based on your own capacity and programme needs. Remember that not a single venue will satisfy all your needs and you will have to prioritise your requirements in terms what is a must, what would really help and what is optional for your particular event instance. Here we outline various aspects of venue requirements which you should consider and prioritise for an event.

- **Capacity**
  - the main plenary room's capacity should be double the number of delegates for comfortable fit, there should be enough rooms and spaces to support different event requirements
- **Spaces that support different event requirements**
  - registration, main plenary room, breakout rooms, communal/break space, poster/sponsor exhibition, storage, quiet space, work space, photo taking, prayer room, etc.
- **Location**
  - ideally located in a place with some wow factor and easily accessible by public transport (ideally with some nearby parking too)
- **Infrastructure**
  - WiFi, A/V, video streaming/recording, power points, sound and portable microphones
- **Catering at the main event**
  - catering for people with different dietary needs and food allergies, clear labelling of food
- **Facilities**
  - storage, toilets, fridge for medication/milk, water points, printing, children on site (or nearby nursery), proximity to prayer rooms (if none available on site)
- **Accessibility**
  - of the venue by public transport and within the venue (location of disabled toilets, accessibility of various rooms, signposting for ease of orientation)
- **Environment sustainability considerations**
  - the use of plastic vs sustainable cutlery and crockery for serving food, what happens to the leftover food
- **Conference dinner hosting**
  - the possibility of hosting the conference dinner at the venue

6.9 Catering

Prices for catering should have been used for the budget projection at the FS stage.

When submitting an order for the workshop, the EL or their designate in this matter should take into consideration people's dietary requirements which should have been asked at registration time.

The EL (or designate) should find out from the caterers when is the latest date to submit an order. It might be worth ordering 5%-10% extra meals if you envisage extra registrations between ordering the food and the event. This should be factored into the budget preferably at the FS stage (the budget template shows an example of this).

It might be tempting to order the cheapest things on the menu to meet the budget but at a multi-day event having variety, quality and reasonable portions can help keep the participants fuelled for learning and interaction. If you are charging your audience to attend the event then it is best to give careful consideration to catering and order something reasonable.

It can be time-consuming to arrange catering so this might be best assigned as a task to someone during resource allocation.

6.10 Event Roles

There are certain roles (see examples roles) that are needed before, during and after the event. These roles can vary depending on the balance of the event and some of the roles naturally go together. It should be noted that one has to be careful with the role allocation as some combination of roles might be incompatible with engaging in events or require local knowledge or skills, so they would only be suitable for certain types of individual.

6.10.1 A duties roster

For medium-sized or large events it is essential to put together a duties roster (see example roster) before the event so those assigned different roles know what they need to be doing at different times. Scheduling duties decreases problems with communication as it's transparent what different team members are committed to do at different times. Duties usually forgotten when creating the schedule are registration and reception.

For the EL, there may be assumptions about who should be included in the roster. For example, for CW as the premier event of the Institute, all staff are expected to attend and play a role so they expect some duties. Where this is not the case doing a call out to the organisation or even asking a local contact for volunteers may be the right way to go. PhD students helping at events has a long tradition (it might be worth presenting them with a gift for their efforts at the end of the workshop).

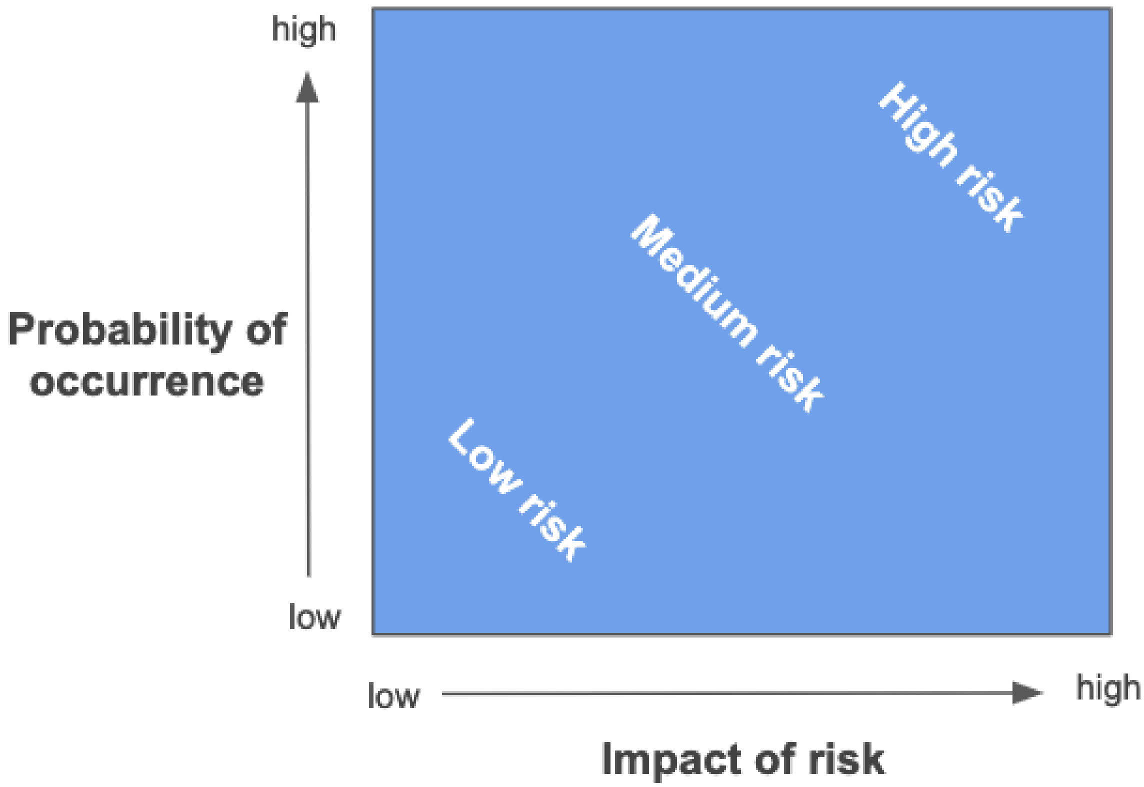
6.11 Risk Management

Risks are events that could have a negative impact on the project. Risk management (or risk analysis) is the process of identifying and assessing potential risks and their impact. Every risk assessment should be followed by a risk mitigation plan - actions designed to eliminate or minimise the impact of the identified risks.

6.11.1 Risk Assessment

Typically, risks are assessed against 2 axes - the severity of the impact they have on your event and probability of them happening, by placing them on the chart such as the one below. Next, they are classified into several categories on a low - high scale, for example:

- low risk - the risk is acceptable; it is OK to proceed with the event planning but keep an eye on the risk;
- medium risk - the risk needs to be addressed and mitigation strategy put in place;
- high risk - the risk is critical and may have an adverse effect on your event and stakeholders; you may even have to rethink if the event should go ahead.



You can decide for yourself where to draw the boundaries between the risk categories on your risk chart. It is also OK to classify your risks on a more fine-grained scale, e.g. low, medium, high, extreme - based on your individual risk assessment. For example, consider the following risk assessment matrix (obtained from Wikipedia Commons under CC BY-SA 4.0 licence).

For events such as the CW or CC, we typically look at the following risk aspects:

- The main stakeholder and funder (the Software Sustainability Institute)
- Other stakeholders (sponsors, keynote speakers, attendees, session chairs, organising committee members, volunteers/helpers at the event)
- Budget
- Event agenda
- Venue
- Catering
- Communication (with various stakeholders)
- Policies, guidelines and documentation

When identifying risks, bear in mind that they can happen at different times in the planning and implementation stages before the event, as well as during and even after the event.

Here are some examples of risks identified when organising an event such as the CW or CC.

- **The main stakeholder**
  - Event goals not aligned with the main stakeholder goals

RISK ASSESSMENT MATRIX

RISK RATING KEY	LOW	MEDIUM	HIGH	EXTREME
	0 – ACCEPTABLE	1 – ALARP (as low as reasonably practicable)	2 – GENERALLY UNACCEPTABLE	3 – INTOLERABLE
	OK TO PROCEED	TAKE MITIGATION EFFORTS	SEEK SUPPORT	PLACE EVENT ON HOLD

	SEVERITY			
	ACCEPTABLE LITTLE TO NO EFFECT ON EVENT	TOLERABLE EFFECTS ARE FELT, BUT NOT CRITICAL TO OUTCOME	UNDESIRABLE SERIOUS IMPACT TO THE COURSE OF ACTION AND OUTCOME	INTOLERABLE COULD RESULT IN DISASTER
LIKELIHOOD: IMPROBABLE RISK IS UNLIKELY TO OCCUR	LOW – 1 –	MEDIUM – 4 –	MEDIUM – 6 –	HIGH – 10 –
LIKELIHOOD: POSSIBLE RISK WILL LIKELY OCCUR	LOW – 2 –	MEDIUM – 5 –	HIGH – 8 –	EXTREME – 11 –
LIKELIHOOD: PROBABLE RISK WILL OCCUR	MEDIUM – 3 –	HIGH – 7 –	HIGH – 9 –	EXTREME – 12 –

- Incidents during the event can damage the main stakeholder's reputation

- **Sponsors**
  - Not enough sponsorship
  - Offers made to sponsors that cannot be fulfilled
  - Sponsor's logo is not displayed at all at the event (or not displayed appropriately), spelling and branding mistakes occur
- **Keynote speakers**
  - Delay in confirmation or dropping out
  - Speaker go off track in their talk or use offensive language
- **Attendees**
  - Not enough attendees or many dropping out right before the event
  - Too many attendees
  - Attendees complain about a certain aspect of the event
- **Session chairs**
  - Not enough session chairs
  - Session chair fails to show up or it is unclear to them how to chair a session
- **Organising committee members**
  - Not kept up to date with the progress of event planning
  - Not sure how to contribute or how to share information and coordinate between different organising committee teams
  - Do not have appropriate access to documentation
  - Not completing tasks assigned to them
  - Do not know where help is needed and what their duties are at the event
  - Feel unappreciated or excluded
- **Volunteers/helpers at the event**
  - Not enough volunteers
  - Volunteers not showing up or not fulfilling the tasks assigned to them
  - Feel unappreciated or excluded
- **Budget**
  - Insufficient budget (e.g. registration fees not set at the appropriate level)
  - Unexpected expenses (e.g. extra catering, unforeseen or unbudgeted costs, damage to the venue)
  - Overspending
- **Event agenda**
  - Not designing an effective agenda to meet the event's goals and keep people's interest and focus
  - Speakers dropping out at the last minute
  - Not fulfilling certain plans (e.g. social activities, good venue for conference dinner, etc.)
  - Unexpected bad weather so cannot e.g. take group photo or do social activities outdoors

    - Post-event feedback highlights missed opportunities

- **Venue**
    - Not finding the best venue for the specific date
    - Venue cancels before the event
    - Problems at the venue (accessibility, AV, etc.), fire tests, real fire alarm, venue needs to be evacuated
- **Catering**
    - Not finding specific catering for the specific date
    - Catering cancels before the event
    - Lack of certain food of preference, wrong food delivered, missing food items, food not properly labelled for allergens and dietary requirements
- **Communication**
    - Lack of transparent, efficient and effective communication with different stakeholders, e.g. not communicating clearly aims, expectations, planning decisions, task delegation
    - Participants confused about the agenda or not getting information on the right channels and at the appropriate time/frequency
    - During the event - signage not properly placed, people do not know who to contact to address certain queries or concerns
    - Participants do not receive information about what to expect after the event
- **Policies, guidelines and documentation**
    - Lack of information or information dispersed at various locations
    - Lack of clearly stated policies and guidelines (e.g. Code of Conduct policy and breach reporting and handling procedures, privacy policy, contribution guide)
    - Certain documentation gets lost or corrupted

See a more detailed example of risk assessment along with risk rating.

6.11.2 Risk Mitigation

Based on each individual risk identified during the risk assessment - a strategy is needed to prepare for and lessen the effects of risks if they occur. It is OK to say that you will not take any action for an identified risk, as long as you have taken it into account and assessed. Below are some mitigating strategies for risks identified for CW and CC events.

- **The main stakeholder**
    - Make sure that the main stakeholder's and event's goals are clear and aligned, and get a sign-off for the event plan from the main stakeholder.
    - Think about the worst case scenario, consult with the legal and communication teams how such incidents could be handled, have a security policy in place that is clearly communicated with everyone.
    - Make sure that the budget is carefully monitored throughout the event planning and implementation stages.
- **Sponsors**
    - Put sponsorship committee into place to look for sponsors and focus on those that share your values.
    - Have a range of sponsorship opportunities and levels and clearly communicate them to potential sponsors.

  - Make sure it is clear what the sponsorship money can be used for, e.g. whether it is intended for a specific purpose, such as travel grants, dinner sponsorship, coffee break sponsorship, etc. and that it is used as agreed.

- **Speakers**
  - Make sure that the speaker's needs are discussed ahead of the event and state clearly what is possible and what is not.
  - Communicate Code of Conduct clearly before and at the event.
  - Have back-up speakers in mind and on stand-by if possible.
  - Have time-keeper or session chair signal the time to the speaker.
- **Attendees**
  - Define ticket prices based on the expected number of participants and make sure the ticket revenue can cover the basic costs of venue and catering.
  - Offer discounted tickets for certain categories, e.g. students or self-funded participants.
  - Block registrations after certain number is reached to avoid too many attendees you cannot handle or talk to the venue about increasing capacity.
  - Communicate Code of Conduct clearly before and at the event to set the expectations.
- **Session chairs**
  - Have organising committee members as back up to step in if session chairs do not show up.
  - Make sure that chairing rules are communicated ahead of the event, talk to your chairs in person if possible before the session and use your organising committee members as back up.
- **Organising committee members**
  - Define different roles and let people choose what they want to do, communicate clearly what is expected from each role.
  - Devise a duties roster for the event where everyone is assigned tasks and communicate it ahead of the event.
  - Thank your organising committee members in person, make sure they are made known to the audience and feel appreciated; send them 'a 'thank you' note after the event and consider a small gift if possible.
- **Volunteers/helpers at the event**
  - Plan ahead and recruit more local people if needed.
  - Communicate expectations clearly and make a duty rota for the event to make sure everyone knows what they are doing.
  - If budget allows, have special t-shirts for the helpers; thank them in person, make sure they are made known to the audience and feel appreciated; send them 'a 'thank you' note after the event.
- **Budget**
  - Go for a cheaper venue (get at least 3 quotes); only pay for absolutely necessary things (rooms and catering) and cut all extra and non-essential costs (they can be added if you attract sponsorship).
  - Look for more sponsorship.
  - Evaluate ticket prices (the registration revenue should roughly cover venue and catering costs).
  - Have a contingency fund.

  - Overspending should be avoided by careful budgeting before the event and keeping an eye on all costs and with contingency fund.
- **Event agenda**
  - Communicate with the organising committee ahead of the event to make sure that the agenda satisfies your criteria and all potential opportunities are explored.
  - Have back-up speakers ready to step in at a short notice if possible.
  - Make alternative plans for activities that depend on weather (e.g. schedule a second indoor location for group photo).
  - If post-event feedback highlights something that was missed, make note of this information as "lessons learned" to pass them on the future events organisers (or future self).
- **Venue**
  - Look at several venues, see if dates can be changed, put insurance in place for venue cancellation.
  - Visit venue ahead of booking and check accessibility, AV equipment, availability of technical support, fire alarm schedule.
- **Catering**
  - Look at several caterers and make sure there are alternatives; put insurance in place for cancellations.
  - Ahead of the event, communicate clearly to the caterers attendees' dietary requirements.
  - Early on you can discuss potential/expected dietary requirements and check if the caterers can fulfill them all (e.g. gluten-free, vegan, vegetarian, halal, kosher).
  - Request all food to be labelled.
  - To avoid cases where not enough food is available, discuss portion sizes and quantities with the caterers ahead of the event and consider ordering 10% more or increase quantities for the following day.
- **Communication**
  - Assess and prioritise stakeholders (based on their power and interest in your event) to know how to communicate with each of them.
  - Make communication and publicity plans and choose what communications channels you are going to use based on your audience (e.g. news items, emails, blogs, twitter, slack, etc.).
  - Define privacy policy for handling people's sensitive data and stick to it for any communication with people who registered to attend your event.
  - Communicate the agenda clearly on various channels and in a timely manner.
  - Assign roles to organising committee for communication on different issues during the event (Code of Conduct committee, first point of contact, etc.) and make those roles clear to participants before and at the event.
  - Discuss placing signage with venue.
  - Communicate any follow-ups with participants according to your privacy policy.
- **Policies, guidelines and documentation**
  - Document the processes, policies and guidelines and make notes of meeting minutes.
  - Make sure everyone knows where documentation is kept and has the correct access rights.
  - If any materials are made available ahead of the event, e.g. speakers' presentations, slides, abstracts and talks, make sure they are communicated to the audience in a timely manner.

- Use cloud infrastructures for storing documents (such as Google docs, GitHub), where document history is preserved and documents are backed up automatically.

An example detailed risk mitigation plan for each identified risk from the *Risk Assessment* section is available online.

6.12 Outputs and Outcomes Plan

6.12.1 Outputs

This should be revisited to put in place what you will make available and what you won't. For instance, for a CW type of event this could include:

- **Presentations**
  - From keynotes (slides, videos)
  - From lightning talks (slides, videos)
  - From mini-workshops (slides)
- **Speed blog posts**
  - From discussion sessions
- **Collaborative ideas**
  - Making the final ideas available
- **Hackday**
  - Information about entries and winners
  - Team/Project name
  - Presentations
  - Links to the software/output

6.12.2 Outcomes

They tend to match to meet objectives but the EL should decide if a report or analysis of the workshop outputs for themes might allow, for example, change of mindset to be detected. Feedback results can also be part of this. Longer term analysis (e.g. surveys after the event may also be useful to see if the workshop has, for instance, changed practice or led to further collaborations). See the Ten simple rules for measuring the impact of workshops for more ideas and guidance.

6.13 Closing Down the EPS

Just because the event is over doesn't mean the event is done. Closing down the EPS is still part of the EPS and it requires effort and planning - it can sometimes not be seen as 'glamorous' but it's certainly important for organisational reputation and following up on commitments, promises and making resources available.

6.13.1 At the end of the event

If there are activities which need any action from event attendees then they should be made aware of this; for example, the EL will be gathering feedback or following up with them about speed blogs.

Also if you're aware of other events and/or a follow-on event, making attendees aware of these will help meet the wider goals and objectives of your organisation.

Sponsors and volunteers should be thanked again at the end of the event.

6.13.2 After the event

Soon after the event, there are a number of tasks that can be done straight away and some tasks which might take a bit more time to complete.

If the EL collects feedback then feedback forms should be ready to send the next working day after the event - the danger of leaving this for longer than a week is that people will start to forget what happened as they get back to their normal routines. Ideally, the email asking for feedback with a link to the feedback form will be ready before the start of the event.

For larger events, the EL may solicit blog posts about people's experiences at the event. This request should also be made in the week following the event.

A report summarising what happened at the event can be quite time-consuming to produce and it's worth thinking about which type of report you want; e.g. a paper on major themes, an event report that has a 'being there' style, or a summary of resources produced and available from the event. From experience, producing the report can take up to four months after an event like CW, as the content is dependent on reviewing what happened and other resources being made available.

If resources (such as presentations, video recordings, speed blog posts and outputs from a Hackday) are going to made available then these need to be commissioned or collected. From experience, preparing a video of the event, which may include watching, editing, adding a cover, uploading (e.g. to YouTube) and updating pages, takes a long time. You also have to decide when to publicise the materials (e.g. as they are made available or when they are all ready) - this should be part of your publicity plan.

6.13.3 When are you done?

When all of the outputs you planned to produce are available, you can consider the output side of the event done.

For outcomes, the EL may want to track longer-term changes – for example, a longer-term survey (~after six months or a year) for attendees might be useful to assess the impact of your event.

If this is all you planned for, then the event is done.

It is possible that page hits, resource usage, and citation of the report might feed into tracking wider organisational impact and those in charge of this should be made aware of these resources.

CHAPTER 7

About

7.1 Authors

- Shoaib Sufi (lead/maintainer) (ORCID)
- Selina Aragon (ORCID)
- Aleksandra Nenadic (ORCID)

Other contributors:

- Mario Antonioletti (ORCID)
- Raniere Silva (ORCID)
- Clem Hadfield
- Robin Wilson (ORCID)
- Malvika Sharan (ORCID)
- Jacalyn Lairn

7.2 Licence

7.3 Acknowledgements

The work carried out by the Software Sustainability Institute is supported by:

- EPSRC, AHRC, BBSRC, ESRC, MRC, NERC, STFC grant EP/S021779/1

- EPSRC, BBSRC and ESRC grant EP/N006410/1
- EPSRC grant EP/H043160/1