Planning and preparation for an online dialogue: a generic ordering and timing of tasks project teams[1] undertake in the lead up to an event

Resource type: Template

Last updated: February 2015

Establish the rationale: three months beforehand...

Tasks to get done:

- Establish the event rationale. This is based on context analysis about the audience and the wider environment by the project lead and with advice from close critical friends. It will be augmented and refined by the project team and in dialogue with key stakeholders.
- Define project objectives, establish the budget and M&E requirements
- Secure the resources required / available.
- Convene the project team - Outline who is needed, which role(s) will be required, and what is specifically involved for each person, especially during the planning / preparation phases

Planning and Preparation: two months beforehand...

Tasks to get done:

- Have an introductory meeting of the project team to explain the rationale and learn how previous projects have used the approach in their projects.
- Identify 10-12 relevant project team boundary partners who will act as champions for the project / event. Use these champions in three key ways:
    - As guinea pigs who will check your overall proposition makes sense - not only should it fit with your project goals but also responds to individuals' own agendas, their capacity to engage and their confidence in the likelihood of influence / impact down the line.
    - As the core members of an augmented group of keen and willing participants.
    - As gatekeepers who connect you with the key target participants they know that you can't reach. Make the most of these 'warm' leads first.
- Craft the 'irresistible invitation' that is designed to make the event as attractive as possible

[1] A team typically includes the following roles (ideally with only limited overlap between individuals): a project lead, one or more facilitators / moderators, and one or more convenors. Other roles such as co-ordinator may combine elements of project advisor / tech support / M&E resource.

- Send mass email invitations out to e.g. 'people you've found on the web but don't actually have a relationship with' once you've worked through your initial contacts and need a 'second wave' to fill the gaps in representation.
- Either commission and start to produce a background document / stimulus paper, or collate (and synthesise) relevant materials already in existence
- Start to identify individuals who might be prepared to write 'kickstarter' contributions for the beginning of each topic area to be discussed.

Options / Questions to consider:

- Are you going to have an open and publicly accessible event or a private, invite-only discussion? Both are genuine options?
- What level of investment (staff or direct costs) can you muster? This affects a myriad of planning decisions, from the length of the event to the range and depth of efforts you go to in order to minimise the risks associated with low-participation rates
- What are the event dates, and the starting / finishing days?
- Will the discussion threads run in parallel or sequentially? Will you consider a welcome thread too?
- Will you make use of a dedicated event mailbox, use mail merging tools, glossy html templates etc.?
- Do any participants have particular needs you could support e.g. language issues / connectivity issues / accessibility issues?

Things to be aware of / watch out for:

- Check who is participating in an e-discussion for the first time and who is a seasoned e-discussion convert? Document this and build their different needs / expectations into the plan so their initial enthusiasm is converted into contributions
- Make sure when emailing potential participants in bulk to bcc them to each message so their details aren't shared with others by accident.

Growing the group of participants: one month to go...

Tasks to get done:

- Check the balance of the group as a whole – consider any power dynamics between individuals that might inhibit participation / create divisions. Approach additional target participants based on the gaps / diversity priorities.
- Define broad themes to be discussed and develop associated questions.
- Agree schedule for threads (if running sequentially)
- Approach individuals who might be prepared to write 'kickstarter' contributions for the beginning of each topic to be discussed.
- If produced, first full draft of background document / stimulus paper to send to potential kickstarter authors. Work in feedback given.
- Send generic reminders to participants who have not responded, as appropriate
- Follow up with at a significant group of them individually by phone (20-30 but hopefully more) to build their commitment and ownership to the event.
- Firm up in more detail who in the project team will commit to playing which role(s) and what that involves / when?
- Start compiling participant data into useful format e.g. Excel (use 'upload' template if you have one).

For further information please visit http://community.eldis.org/.5c6e2d73/ or email eldiscommunities@ids.ac.uk

Things to be aware of / watch out for:

- If you are struggling to get enough participants confirmed – it may not be too late to abort the event or postpone it (if timing is the problem for your targets)

Getting the content assets in place: two weeks left...

Tasks to get done:

- Write and edit the question titles for each thread agreed and the opening text that goes with it.
- Send final generic reminders to participants who have not responded, as appropriate
- Draft text for emails bringing participants into the space (and determine who they should be signed and sent by). Other attachments to draft might include confidentiality guidelines, or a participant bios template.
- Produce detailed time-line of activities in the lead-up to and during the event itself – in particular when / how emails bringing participants into the event are delivered.
- Ensure the project team have a chance to practice on the platform (using a dummy group)
- Identify a group image and any other branding elements requirements (banner / funder logos etc.)
- Send a version of the participant data to the technical support for checking on usage. Implement any changes required on existing data

Options / Questions to consider:

- Will the participant bio document go out before or after participant data is uploaded to the site or after? Doing it before requires a manual process taking significant amounts of time – whereas doing it after can be a largely automated process

Things to be aware of / watch out for:

- Participants often forget to send images of themselves or a bio. These really make a difference so worth chasing up on this point at this stage.

Setting the scene and the stage: one week left...

Tasks to get done:

- If produced, send finalised background document / stimulus paper to all participants as an attachment to 'Event Reminder email', along with participant bio document (if available) and confidentiality guidelines.
- Set up the discussion space on the platform (including image assets)
- Check and finalise thread title length, consistency, linkage to kickstarter texts. Ask: do we have any doubts about whether we've asked our questions in the most inviting way for the participants we have on board?
- Revisit and update detailed time-line of activities as necessary – particularly the 24 hours leading into the event itself.
- Receive and edit the kickstarter contributions from authors so they are fit for purpose.
- Send final version of participant data sheet to technical support for checking and uploading. Work in any final amendments as required.

- Clarify roles again – how will facilitators / convenors work together to advance the discussion once it has begun
- Arrange a conference project call early during the day before the event to go through final issues.

Options / Questions to consider:

- You could write to participants saying 'if anyone thinks they might not be able to participate we'd be happy to receive your contributions in advance – we can post them on your behalf at an appropriate point'.

Things to be aware of / watch out for:

- Questions / thread openers can be mismatched for participants – too academic, too specific, too leading etc. Check there is room for manoeuvre and self-expression of 'the burning issues'.

Bringing participants into the space: the final 24 hours...

Tasks to get done:

- Get as many of the project team together for conference call / meeting early in the day.
- Check the reports provided by technical support from the bulk upload / group joining process.
- Send participants the 'Participation / Logging on' instructions email
- Respond to any last minute confirmations from participants – and join them as appropriate
- Finalise the text for the 'FAQs email'
- Revisit and update detailed time-line of activities as necessary.

Things to be aware of / watch out for:

- Participants in the Far East may need to receive emails before they end their working day
- You should have two versions of a 'Participation / Logging on' instructions email – one for new members and another for existing ones.