

Coordinating a digital skills workshop in three steps

There is a lot to consider when coordinating a workshop. [New Zealand eScience Infrastructure \(NeSI\)](http://www.nesi.org.nz/services/training) created this resource to help you keep track of the planning, execution, and follow-up details so that your event is as stress-free as possible.

The checklist below lists the milestones you may want to work towards when coordinating a workshop as well as tips for staying on track.

Step 1 - Understand what running a workshop entails

Before you begin preparing for your workshop, make sure you have the basic ingredients covered:

1. Workshop material
2. A [target audience](#)
3. A basic understanding of the workshop coordinating process. Have a look at the general tips below as a starting point.

General tips:

- If you are unfamiliar with running a workshop, start planning at least three months in advance.
- Schedule a weekly 15 min time slot in your calendar for checking this document. Short, consistent check-ins are much more useful than sporadic marathon meetings.
- If possible, co-coordinate your workshop with someone else. Working with someone else helps spread the workload and will make it more likely that you hit your milestones.
- Do a dry run. Before your workshop, have a practice session. This is for checking timing, making sure your technology works, finding bugs in the material, and familiarising yourself with the content. Book this in your calendar early on.
- Coordinating a workshop is a group effort. Step one should always be getting help and clarifying who is responsible for what. Specifically you will need to fill the following roles (people can, of course, fill multiple roles):
 - Lead Instructor(s)
 - Co-instructor(s)
 - Workshop Coordinator
 - Workshop helpers
 - Technical support
 - Coordination support

Step 2 - Form a workshop team

Fill out the 'Who' column in the table below before planning your workshop. This will help you determine who will be doing what and whether you have enough support to move forward with the planning process.

| Role | Tasks/ responsibilities | Who | Notes |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Workshop Coordinator/ Comms | <ul style="list-style-type: none"> • Works closely with the Lead Instructor • Schedules workshop dates/ times • Creates an eventbrite or other 'event' listing • Communicates with workshop registrants before and after workshop when required • Books room/ catering if applicable • Promotes the event | | |
| Lead Instructor(s) | <ul style="list-style-type: none"> • Ultimately decides what is included or not included in the workshop material • Ensures learners get the right setup instructions before the workshop (liaise with the Workshop Coordinator) • Has final say on who teaches what topic • Is responsible for making sure there is a collaborative document for learners and a workshop website (if applicable) • Makes sure there are enough helpers for the workshop and that the helpers are prepped • Schedules meeting(s) with instructors/ helpers before the workshop to plan details | | The Lead Instructor can, of course, get help for these tasks, but is ultimately responsible for the workshop details. |
| Co-instructor(s) | <ul style="list-style-type: none"> • Teachers a predetermined section of the workshop material • Learns lessons beforehand and meets with other co-instructors to plan delivery details | | |
| Helpers | <ul style="list-style-type: none"> • Learns lessons beforehand • Must be present on the day of the workshop • Helps learners who are stuck by walking around the room answering questions. | | <p>One helper for every eight learners is a good ratio for in-person workshops and 1:5 is good for online workshops.</p> <p>Helpers should be confirmed no less than three weeks before the workshop.</p> |
| Technical support | <ul style="list-style-type: none"> • Provides the platform/technical infrastructure for the workshop (if required) • Helps with testing the material on the platform beforehand - new workshop material must be ready to test three weeks before a workshop if you run a workshop on NeSI | | <p>If you are wanting to run a workshop on NeSI reach out to support@nesi.org.nz</p> <p>Software installation requests are to occur at least four weeks in advance if you run your workshop on NeSI</p> |
| Coordination support | <ul style="list-style-type: none"> • Can provide guidance/ support and can answer questions about training coordination best practice or keep workshop preparations on schedule. | | |

Step 3 - prepare your workshop workback plan

Starting by filling in your target workshop date at the bottom of the table. From there, Mentally move back in time and make a list of all the tasks that need to be completed (fill in tasks and target dates from bottom to top). The workback plan below is filled in with typical workshop coordination tasks but is a starting point only - each workshop is unique.

| Relative time | Who | Due Date | To Do |
|---------------|-------------------------------------------|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| >3 months out | Lead Instructor or Workshop Coordinator | | <ul style="list-style-type: none"> <input type="checkbox"/> Determine the target audience for your workshop <input type="checkbox"/> Determine what material you will be presenting at the workshop |
| 3 months out | Lead Instructor | | <ul style="list-style-type: none"> <input type="checkbox"/> Schedule weekly, 15minute check-ins for updating this document. Send a calendar invite to anyone who will be helping with the planning process. |
| 3 months out | Lead Instructor, Technical support | | <ul style="list-style-type: none"> <input type="checkbox"/> Review this tutorial on creating workshop material and confirm you have enough time to develop and test the content you want to present (if applicable) <input type="checkbox"/> Start testing workshop material. <input type="checkbox"/> Notify your technical support person that you plan on running a workshop to discuss feasibility and brainstorm date options. <input type="checkbox"/> Plan on using NeSI resources for your workshop? Review these FAQs and/ or email support@nesi.org.nz |
| 2 months out | Lead Instructor | | <ul style="list-style-type: none"> <input type="checkbox"/> Confirm what material will be used at the workshop and what material you will skip. |
| 2 months out | Lead Instructor | | <ul style="list-style-type: none"> <input type="checkbox"/> Confirm who will be present at your workshop. Start thinking about who will teach what material and how long each lesson will take. |
| 2 months out | Workshop Coordinator with Lead Instructor | | <ul style="list-style-type: none"> <input type="checkbox"/> Confirm workshop date and location (Keeping in mind instructor availability) <input type="checkbox"/> Book workshop venue. Your venue should have a podium (optional), projector, movable tables, plenty of outlets, and room for helpers to walk around. Make note of how many people can comfortably fit in the room you book so that you can cap your registration numbers appropriately |
| One month out | Workshop Coordinator or Lead Instructor | | <ul style="list-style-type: none"> <input type="checkbox"/> If you are running a Carpentries workshop, notify your Carpentries Regional coordinator of the workshop by filling out this form |
| One month out | Workshop Coordinator and Lead Instructor | | <ul style="list-style-type: none"> <input type="checkbox"/> Write a workshop description. It is helpful to have 2-3 people co-create this. Click here for tips on what to include in an event description. |
| One month out | Workshop | | <ul style="list-style-type: none"> <input type="checkbox"/> Create a workshop registration page using |

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|---------------------------------------------|-----------------------------------------|--|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | Coordinator | | the workshop description |
| 3 weeks out | Workshop Coordinator or Lead Instructor | | <ul style="list-style-type: none"> ❑ Open registration and promote your workshop in newsletters, mailing lists, etc. Note: if you are requiring people to register, make sure you collect their name & email address in case you need to send them any information prior to the session |
| 3 weeks out | Lead Instructor | | <p>Confirm all helpers</p> <ul style="list-style-type: none"> ❑ Send anyone involved with the workshop a calendar 'save the date' ❑ Explicitly communicate expectations and logistics via email (i.e. who will teach what) ❑ Remind workshop helpers to review the workshop material |
| 3 weeks out | Lead Instructor | | <ul style="list-style-type: none"> ❑ Meet with helpers and co-instructors to answer any questions and go over expectations. At this meeting, schedule a final run-through approximately one week before the workshop. |
| 2 weeks out | Workshop Coordinator | | <ul style="list-style-type: none"> ❑ Close workshop registration. Note: if you are running a free workshop you may have 'no-shows'. For typical Carpentries workshops 40% of registrants do not show up. |
| 2 weeks out | Lead Instructor or Workshop Coordinator | | <ul style="list-style-type: none"> ❑ Once workshop registration is closed notify technical support of attendee list for technical prep |
| One week out | Workshop Coordinator | | <ul style="list-style-type: none"> ❑ Send registrants pre-workshop instructions and a reminder of where the workshop is or what the zoom details are. |
| One week out | Lead Instructor | | <ul style="list-style-type: none"> ❑ Host a run-through with instructors and helpers. |
| 3 days out | Lead Instructor or Workshop Coordinator | | <ul style="list-style-type: none"> ❑ Gather workshop materials including red/green sticky notes, white board markers, etc... If you are running your workshop online check your teaching setup. |
| 1 hour before | Workshop Coordinator | | <ul style="list-style-type: none"> ❑ If the workshop is online, resend the zoom link to all attendees. |
| Start here! Workshop Date YYYY-MM-DD | | | |
| 1 day after | Workshop Coordinator | | <ul style="list-style-type: none"> ❑ Send registrants a follow-up email with any relevant information (resources, how to get help, future learning opportunities, link to a feedback survey, etc) |