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Running a Workshop - Template and guide

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# Gantt chart

Gantt charts are a useful way of mapping out projects over time. The proposed activities of the Gantt chart might be different depending on the workshop you are running (e.g. whether it is a laboratory based workshop or classroom based). You must allow enough time for all of your participants to apply for and obtain a visa for the country (check with the embassy how long this will take and factor it in).

The below Gantt chart is a generic one, with a timeline based on the UCL capacity building team experience. . If there is more than one partner running the workshop and/or there is more than one country involved, make sure you factor in adequate extra time (and take into account that some processes may take longer in other countries).

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Five months before | Four months before | Three months before | Two months before | One month before | Three weeks before | Two weeks before | One week before | During work shop |
| Identify concept |  |  |  |  |  |  |  |  |  |
| Organising a budget |  |  |  |  |  |  |  |  |  |
| Create an advert for the workshop and an application document for applicants |  |  |  |  |  |  |  |  |  |
| Applications open |  |  |  |  |  |  |  |  |  |
| Applicants informed |  |  |  |  |  |  |  |  |  |
| Confirm speakers |  |  |  |  |  |  |  |  |  |
| Delegate visa applications |  |  |  |  |  |  |  |  |  |
| Schedule defined |  |  |  |  |  |  |  |  |  |
| Room booking |  |  |  |  |  |  |  |  |  |
| Booking catering |  |  |  |  |  |  |  |  |  |
| Ordering items |  |  |  |  |  |  |  |  |  |
| Room set up |  |  |  |  |  |  |  |  |  |
| Practical set up |  |  |  |  |  |  |  |  |  |
| Supporting material preparation (laboratory manuals and general information) |  |  |  |  |  |  |  |  |  |

# Tick lists

Below is an example of items that you may need to book/print/prepare. Creating a tick list helps you to keep a track of what you have done and what still needs to be done. This could also be in the form of a spreadsheet.

To book:

* Rooms
* Catering (breaks)
* Catering (lunches)
* Catering (external dinner)
* Flights for delegates
* Accommodation for delegates

To print:

* Information booklets/protocols
* Evaluation forms
* Registration forms (each day)
* Signs to direct delegates
* Certificates
* Name badges

To purchase:

* Reagents
* Name badge holders

# Budget

The budget will need to be worked out based on available funds and with the approval of the centre director/budget manager etc. You will need to decide from what project the funding will come from and work out how much external applicants (those not funded by your funding organisation) need to pay. This will need to be approved before advert and applications are sent out, so external delegates know the cost of the workshop and whether they have to pay for flights and accommodation. Items to take into consideration to estipulate your budget:

* Laboratory reagents
* Food and drink (easier to pay for all subsistence via the hotel)
* Flights
* Accommodation
* Visas and travel (external expenses)
* Equipment use/hire

# Delegates

The most important time constraint is allowing delegates enough time, from the point at which you notify them of their success, for them to apply for Visas. African delegates are likely to need at least 8 weeks to apply for the UK for example, but this will differ depending on the host country.

## Applications

You will need to create a flyer to advertise the workshop. You will need to add the logos of all institutions involved. Remember to include all the relevant details:

* Title of the workshop
* Date and location
* List of speakers
* Registration fee (if applicable)
* Number of available places
* How to submit the application form (e.g. email address)
* Application deadline

The application form will need to include all the details that you might need to book flights/accommodation (if they are applying for a funded place) to save time and communication when contacting successful applicants. This should include their first, surname and middle name as it appears on their passport. The further information can be altered to suit the requirements of your workshop, like candidate’s previous experience, for instance.

## Expenses

Consider extra expenses when booking accommodation. It might be cheaper (and easier) to book somewhere within walking distance of the workshop location so you do not have to book transportation at the beginning and end of every day. Per diems are not usually covered, so it is easier to book accommodation which provides breakfast and dinner in the price. If you are paying for delegates’ travel and visas etc. ensure that you mention that they will need to provide you with receipts, in order to process their expenses. Ideally collect them during the workshop, otherwise they will have to scan them and send them to you by email.

# Venue

Depending on the location and time of year (i.e. whether the workshop is during term time or not), you will need to book the rooms quite far in advance. Take into consideration where you will be having your breaks and lunch, as sometimes lecture rooms do not allow food and drink to be consumed in them. Organising a group meal on one of the evenings is a good way to encourage networking between delegates and organisers. Take into consideration dietary requirements.

## Printing

Items to consider include:

* Certificates of attendance
* Workshop booklets (including agenda, list of speakers etc.)
* Evaluation forms
* Practical session protocols (allow plenty of space for people to make notes)
* Attendance forms (per day)
* Any laboratory worksheets (e.g. for writing down values)
* Name badges (for delegates, organisers and speakers)
* Consider printing ice breaker sheets to facilitate networking

# Scientific aspects

If your workshop includes practical laboratory aspects, you will need to decide which protocols you will be covering, what reagents and consumables you need (e.g. pipettes, microtubes, plates, racks, tips) and then work out how much you will need to aliquot for the each group. Ensure you tell your colleagues in advance that you will be using equipment so they can plan around it for their own experiments (you might need to use almost all of the pipettes in the department for instance)

Ordering reagents should be done in plenty of time so that everything arrives before the workshop. If in doubt, ring the company to ask for delivery details.

# Workshop content

When planning the timetable take into consideration the group sizes and the fact that most of your delegates will be new to the procedures. Therefore, what might take an experienced user 20 minutes might take a class of 20 participants well over an hour. Factor in between 50-100% more time than you think you need for experiments, as well as demonstration time. Consider time for questions and discussion time for both practical and theory sessions.

Consider how much practical and theoretical content you wish to have, as well as how many days you plan to run the workshop. Having large blocks, especially of theoretical content, can be tiring for delegates, so consider breaking it up into smaller chunks of practical, theoretical and discussion sessions.

Planning long coffee breaks (e.g. 30 min) are useful for two purposes: 1) it enables more time for networking; 2) if a session overruns the predicted time, you can easily shorten the break, so the next session will be back on time.