ArchivesSpace Forum Planning Checklist Template

As you begin planning your ArchivesSpace forum, this checklist may serve as a guide as you create your own checklist and timeline for the event. Keep in mind, this timeline is only a suggestion. You may find that you need more time to prepare certain elements of the event and should adjust accordingly.

At least 5-6 Months Before Forum

- ❏ Decide you would like to host an ArchivesSpace Forum
- ❏ Complete the *Forum in a Box* application
- ❏ Submit the application to the ArchivesSpace program team
- ❏ Receive and answer follow-up questions from ArchivesSpace team
- ❏ Receive approval and begin planning!

4-6 Months Before Forum

- ❏ Convene forum planning group
  - ● Coordinate including call for participation in ArchivesSpace monthly update, ArchivesSpace blog and ArchivesSpace listservs with Community Engagement Coordinator
  - ● Send reminders as appropriate

4 Months Before Forum

- ❏ Send Doodle poll to planning group volunteers for first meeting
- ❏ Hold first planning meeting
- ❏ Create wiki page for the forum and pages for planning team meeting notes
- ❏ Continue to meet weekly or bi-weekly to plan forum
- ❏ Determine parking and transportation options and post to wiki
- ❏ Post a list of recommended hotels and/or restaurants for attendees (option)

3-4 Months Before Forum

- ❏ Call for presentation topics and presenters
- ❏ Submit Assistance Request Application to ArchivesSpace program team (if seeking financial or in-kind assistance)
- ❏ Create registration
- ❏ Make registration available
- ❏ Contact catering to explore options and make initial decisions
- ❏ Coordinate inclusion of registration announcement in the ArchivesSpace monthly update, ArchivesSpace blog and ArchivesSpace listservs with the Community Engagement Coordinator

1-2 Months Before Forum

- ❏ Confirm presenters and draft agenda for the forum
- ❏ Communicate with presenters (inquire; confirm; communicate expectations and instructions)
- ❏ Solicit "day-of" on site volunteers
- ❏ Prepare a list of lunch options (if lunch is on your own)
- ❏ Prepare parking and transportation information
- ❏ Create or identify an iconic image to represent the forum (for registrations, program, swag, etc)

2 weeks before regional forum

- ❏ Prepare introductions of presenters
- ❏ Gather presentation slides or any presentation materials in advance of the forum if necessary
- ❏ Confirm Forum Wiki Page contains correct directions to the facility and an up-to-date agenda
- ❏ Send registration reminder before registration closes
- ❏ Contact the ArchivesSpace Community Engagement Coordinator about any desired giveaways and schedule shipment of those materials
- ❏ Generate post-forum survey and include on Forum Wiki Page

Week of forum

- ❏ Print name tags and programs
- ❏ Finalize catering
- ❏ Walkthrough of facilities, if possible
- ❏ Send a reminder email to all participants

Day of forum

- ❏ Arrive early to ensure facilities and AV are appropriate and ready
- ❏ Establish an area to serve as the welcome and registration desk
- ❏ Check in with presenters to confirm they have everything they need

Post forum

- ❏ Edit and post to the wiki any notes, slides or recordings
- ❏ Send reminder to attendees to complete post evaluation survey
- ❏ Send survey results to ArchivesSpace program team
- ❏ Contact the ArchivesSpace program team to schedule a debrief