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 the ArchivesSpace program team
  ● 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 ArchivesSpace program team
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 program team 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