Title: Red List Workshop Planning

Purpose: To follow an effective process to plan and execute a Red List Workshop

Scope: Regional or thematic Red List Workshops

Outcome: A successful Red List Workshop

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Date: 12 November 2018

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Date: 19 November 2018
05 December 2018

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Date: 17 January 2019
09 May 2019

Planning a workshop is a long process involving many parties, with the bulk of the logistical planning done by the Logistics Coordinator. As such, this process map has been separated into tasks largely done by the Logistics Coordinator (those on the left side, but note a few exceptions), and actions taken by other parties which are on the right side with the respective responsible parties listed next to the actions. A number of these actions can be done simultaneously as indicated below. Other parties include the Red List Authority Coordinator, Primary Red List Assessor (Primary RLA), Principal Investigator (PI), hosts, and participants. The tasks are broken down based on the amount of time prior to the workshop that each action should be completed, blue categories are to be completed prior to the workshop, green to be completed during the workshop, and orange to be completed after the workshop.
Logistics Coordinator Process

Start

Initiate contact with Regional Vice Chairs/potential workshop hosts

Discuss options for workshop location, venue, and dates

Select participants – see Participant List Process map

Confirm workshop dates

Select workshop venue

Select hotel

Create budget spreadsheet

~ 4 months prior to workshop

Red List Authority Coordinator

Red List Authority Coordinator/Primary RLA/PI

Red List Authority Coordinator/Hosts

Red List Authority Coordinator/Hosts

~ 3 months prior to workshop
~ 3 months prior to workshop

- Negotiate package with hotel
- Pay hotel deposit *with PI
- Submit hotel requisition to SFU finance *with PI
- Plan and book flights *with participants
- Organise catering (lunch, coffee breaks)
- Obtain final travel itinerary from all participants *with participants
- Plan dinners (select restaurants, make reservations)

~ 2 months

- Invite workshop participants

~ 2-3 weeks

- Red List Authority Coordinator
~ 2-3 weeks

Create spreadsheet with arrival/departure information (ports, flight numbers, times)

Plan ground transportation (airport/hotel transfers, dinners)

~ 2 weeks

Organise venue logistics (Check-in/out times, payment, room bookings)

~ 1 week

Draft agenda

Review agenda

Print workshop documents (Red List documents, expense claims, workshop certificates, dinner sign-up sheet, agendas)

Provide Agenda and logistics information (eg. accommodation, travel, and per diem details) to workshop participants
During Workshop

Check meeting room (day before workshop)

Call & confirm reservations (daily during workshop) – dinner, transportation

Send post-workshop email to participants (thank you, reminder to provide additional homeward expenses)

Complete/submit expense claims

Post Workshop

Sign expense claims (prior to workshop end)

Complete/submit expense claims

Finish

PI