SOCI@LL
whole school social labs

# D2.2 Plan for the capacitation programme for the animation of open partnerships

Strategies, tools and methods for creating and sustaining open partnerships

**http://wholeschoolsociallabs.eu**

| SCIENTIFIC/ TECHNICAL | SCHOOLS | LOCAL AUTHORITIES |
|---|---|---|
| **PORTUGAL** | | |
| INOVA+<br>Project coordinator | AEAS | matosinhos |
| **POLAND** | | |
| CEO<br>CENTER FOR CITIZENSHIP EDUCATION | Szkoła Podstawowa Nr 3 im. Małego Powstańca w Ząbkach<br>Associated partner | |
| **CYPRUS** | | |
| CARDET | The Grammar School Nicosia | ΔΗΜΟΣ ΑΓ. ΑΘΑΝΑΣΙΟΥ<br>1986 |
| **ITALY** | | |
| cesie<br>the world is only one creature | I.I.S.S. Alessandro Volta<br>Palermo | SPQP<br>Associated partner |
| OXFAM<br>Italia | LICEI<br>GIOVANNI DA SAN GIOVANNI<br>Linguistico · Scienze Umane · Economico-Sociale | Unione dei Comuni Montani del Casentino<br>Associated partner |

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# Course Outline (Indicative paragraph on the content of the document and its objectives)

The main objective of this course is to prepare the staff of the partner organisations to plan and implement successful events, where participatory processes are encouraged.

This programme is intended to help organizations build and sustain partnerships, by helping them meet the challenges and achieve the benefits associated with partnering as well as event planning. This document will help all project partners working with the target group beneficiaries as well as a broad range of stakeholders (schools and school communities, local authorities, scientific / technical experts and other key stakeholders) to actively be involved throughout the project activities and events.

This capacitation programme will take place in Cyprus as a face to face training and will last approximately 16 hours. The hour distribution will be 6-8 hours per day.

The training will be broken down in the following activities:

- Unit 1: Defining a partnership (Time: 2 hours).
- Unit 2: Event planning (Time: 2 hour)
- Unit 3: Budget/Event's cost and expenses (Time: 1 hour)
- Unit 4: Communication (Time: 3 hours)
- Unit 5: Measure the event's success (Time: 2 hours)
- Unit 6: Assessing your strengths (Time: 2 hours)

# 1 Unit 1: Defining a partnership

**Objectives:** The purpose of this section is to provide all the necessary information to soci@ll partners in establishing a partnership or collaborating with other stakeholders (definition, benefits, challenges, sustainability). The main purpose of this unit is to prepare the consortium for setting their own collaborations as well as to provide them with a range of tools to engage them all the way through the project activities. Through this section, soci@ll partners will be encouraged to use the ideas and information provided to develop new and innovative relationships with individuals and institutions who can help make collaboration a reality.

## 1.1 What does partnership mean?

On the one hand, a legal partnership is usually a contractual relationship between two or more parties who agree on specific terms of cooperation. All involved parties have obligations and responsibilities. On the other hand, a collaboration involves cooperation in which the involved parties are not necessarily bound contractually. There is an established relationship, but, it is usually less formal than a legal contract. In addition, responsibilities in a collaboration may not be shared equally. More specifically, a collaboration exists when several individuals who have common interests, assets and professional skills form together in order to pursuit their interest on the benefit of the community.

Establishing a partnership or setting collaborations with stakeholders provides the relevant tools to reach more financial resources, tangible resources, people resources and professional expertise. Having the right people at the right time and doing the right things together is what an organization strives for when creating partnerships. Partnerships are about people working together. More specifically, partnership is a form of business in which two or more people collaborate on a business plan, an activity or an initiative. Persons who have entered into a partnership with one another are called individually “partner/s”.

In addition to this, throughout the project implementation, several results (tangible or intangibles outputs) are obtained. The outputs generated during the project lifecycle can be used by the project partners or other stakeholders, something that can further support the wider aim of the project implemented and its financial prospect. Thus, identifying possible project partners and stakeholders can facilitate the use for a project’s results for scientific, societal and economic purposes.

As a result, some of the advantages of partnership are the following:

- Joint efforts
- Collective decisions
- Efficient administration
- Sharing of risk
- Free from legal formalities
- Flexibility
- Facility of social connection
- Good efficient of mutual agency

Despite the benefits of established partnerships and collaboration in a project, there are several challenges that needs to be tackled such as:

- Unlimited liability
- Delay for decision making
- Administrative complexity
- Inefficient management
- Risk of joint responsibilities

- Lack of mutual trust
- Lack of team spirit

**Types of partnerships**: General partnership, limited partnership, collaboration with stakeholders

- General partnership: A general partner has the authority to act and making decision for all partners. Partners generally share equal responsibilities in relation to the activity involved.
- Limited partnership: A limited partnership includes general partners and one or more limited partners. The general partners arrange and run the business/ project while the limited partners are interested stakeholders who participate in the activities taking place.

**Classification of partners**

- Active partner: The active partner takes part in the management and administrative activities of the business actively.
- Dormant or sleeping partner: The sleeping partner is not actively involved in the management and administrative activities of the business. In most cases sleeping partners are stakeholders who are potentially interested on the results and outputs of the activities taking place. In some cases these are also the target group of the implemented initiative.

**What are the criteria to select partners for an activity?**

Depending on the type of partnership that needs to be established, there are several parameters that needs to be taken into consideration, such as:

- Scientific / technical expertise according to the workplan's needs (synergies)
- Financial capability (in the case they belong in the category of active partners)
- Positive experience in previous cooperation or synergies

**Who cannot be a partner?**

Not everybody can be partners, associates or active stakeholders. Before approaching a person or an organization for establishing a partnership, it is important to be aware of the nature of the activity they need to be involved; and assess their position throughout the project duration.

**Collaboration with stakeholders**

A stakeholder is any person, group, or institution that is involved in an organization's activities. Collaboration across professional, organizational, and cultural boundaries is an inherently appealing idea and a flexible technique for project requirements. It is vital for an organization or a partnership to develop new and innovative relationships with those individuals and institutions who can help make collaboration a reality.

### 1.1.1 Stakeholders engagement

**Establishing a strategy for collaborating with stakeholders**

1. **Know the stakeholders**
   Like most things, content strategy starts with people. Before selecting and building synergies with stakeholders it is key to identify them and be aware of their role within the initiative. In order to collaborate effectively with selected stakeholders, it is vital to understand their potentials and weaknesses.
2. **Identify what a stakeholder is for**
   Each stakeholder has a different role within the collaboration. It is wise to know their motives and goals to the advantage of the project. For example, in the case of the soic@ll project, imagine that the selected stakeholders are teachers and consider including them in every phase of the project while taking into consideration their thoughts and opinions in the drafted activities. This method is significant because these

stakeholders will be directly affected by the results and it is important to engage them through the exploitation phase.

3. **Understand each stakeholder's "language"**
   Communication methods with the selected stakeholders are equally important to their involvement in order to successfully reach them, engage them and have them actively involved.
4. **Set specific expectations**
   Once the target stakeholders have been identified (based on the 3 first criteria), it is time to set the goals and your expectation form their involvement to the project. The more specific you are, the better results you will have.
5. **Show the value of their input**
   The best way to keep the relation with the target stakeholders alive and active is to show them how their input and collaboration has effectively influences and benefited the project results and outputs.

**Classification of stakeholders**:

- **Primary stakeholders**, are people or organizations who, because of power, authority or responsibilities, are central to any project activities. As the outcome refers to them directly, their participation is critical. This category may include school and local community-level groups, private sector interests and local and national government agencies. This group of stakeholders can include also influencers who might not be directly affected by the project activities such as politicians, policy makers and/or funding agencies.
- **Secondary stakeholders** are those with an indirect interest in the outcome of the initiative. In regards to the soci@ll project, secondary stakeholders, may for example, be the school teachers, school leaders or students (who are interested in the continuity of the project). The role and involvement of these stakeholders is secondary to the project activities in relation to the primary stakeholders. As a result, their involvement to the project activities happens periodically.
- **Opposition stakeholders** may have the power to influence other stakeholders. While their influence might be negative it is important to engage them at an early stage and allow them to have the whole picture on the project activities. For a variety of reasons this group of stakeholders may disagree about the project methodology or approach. Their objection might not be justifiable, thus, while searching for stakeholders, soci@ll partners should avoid reaching premature conclusions about which stakeholder should or should not involve.
- **Marginalized stakeholders** may in fact be primary, secondary, or opposition stakeholders who might lack capacity or recognition to participate in collaboration efforts.

Stakeholder engagement during all phases of the soci@ll project need to be integrated into all the project phases starting from the piloting, the implementation phase, testing, exploitation and future activities of the project. In some cases identifying stakeholders for each different phase of the project is not easy. "Initially, it is important to approach stakeholders as open and participatory as possible, encouraging them to contribute to the identification and framing of collaboration goals and objectives" (WWF, 2000). Given the challenge of "open participation" in a collaboration process it is important to remember that all stakeholders (coming from many different groups) do not need to participate all the time, or to the same degree.

## 1.2 Features of successful stakeholders collaboration

**What are the characteristics of a collaboration? What makes some partnerships work better than others?**

It takes time to develop successful collaborations. Developing a trusting relationship where all involved parties feel that there is mutual benefit from the collaboration is essential for success. Partnerships will have a sound basis if the right partners are chosen for the right reasons. Collaboration focuses on building and maintaining s long-term relationship with key stakeholders.

A collaboration with stakeholders can be successful when ensuing the following characteristics:

- Inclusive and non-hierarchical participation
- Participant responsibility for ensuring success
- A common sense of purpose and definition of the problem
- Participants educating each other.
- The identification and testing of multiple options
- Participants sharing in the implementation of solutions
- People being kept informed as situations evolve.

## 1.3 Engaging potential stakeholders in the project

Stakeholder analysis is the process by which the various stakeholders who might have an interest in the SOCI@LL project are identified. A stakeholder analysis generates information about stakeholders and their interests, the relationship between them, their motivations and their ability to influence outcomes. There are several approaches to stakeholder analysis.

The goal of stakeholder analysis is to:

- Identify the stakeholders (by category)
- Develop a strategic view of the situation, and the relationship between different stakeholders and identified objectives
- Guide the establishment of the collaboration scheme, including the strengths of existing collaborators as well as the improvement of relationships with more challenging ones.
- Be aware of stakeholder interests and roles

Stakeholder analysis is an ongoing process that should engage appropriate groups as issues, activities and agendas evolve.

At the initial stage there are a number of guiding questions that can be used to identify the stakeholders who will be relevant to the soci@ll project success. These include:

- Which stakeholders can be actively involved in relation to the soci@ll goals and objectives?
- What are the perceptions of these stakeholders about the implementation and the results that are aimed to be achieved through the project?
- Who best represents the interests for each stakeholder group?

Once stakeholders have been identified, a stakeholder assessment should be conducted to explore the characteristics, interests and intentions of the different stakeholders.

Stakeholders can be identified and engaged in a variety of ways and at multiple levels during the course of a collaboration process. It is also likely that stakeholders will be engaged in more than one relationship or activity at a time, so it is important to provide flexibility to enable participation to evolve into collaboration.

**Stakeholder engagement for collaboration assessment card – an example for stakeholder assessment**

| ORGANIZATION (WHO) | STAKEHOLDER NAME (WHO) | WHY ARE WE ENGAGING WITH THEM? (WHY) | LEVEL/TYPE OF ENGAGEMENT? (HOW) | HOW TO ENGAGE? (HOW) |
|---|---|---|---|---|
| Saint George school | Andreas Andreou | Teacher: introduction of technology in the school curriculum. | Piloting, events, workshops<br>Influencer for the school, teaching staff and students | Emails<br>Newsletters |

| | | | | |
|---|---|---|---|---|
| | | He is interested in the SOCI@LL activities (piloting) | | Invitations to the projects activities |
| Municipality of Nicosia | Maria Georgiou | Head of the department of Cultural, European and Social Issues | Constant communication and information on the project activities.<br>Leader and influencer for a community | Constant updates on projects activities and actions |

# 2 Unit 2: Event Planning

**Objectives:** The success of events in an organization depends on the effective implementation of its training and development plan. The event planning must be informed to a specific model. This is done so that the event is managed effectively and efficiently, as well as, the set objectives are met. Throughout this unit, participants will become familiar to some theoretical and practical models in relation to a system approach of an event planning. These are aimed at enforcing participants' knowledge, skills, attitudes and behaviours. Thereafter, with the completion of this unit, soci@Ll partners will be able to plan and deliver their own events by adapting them and designing them to the trainees' requirements while taking into consideration their specific needs as they have been identified by the project.

## 2.1 Event purpose and concept

A successfully planned and delivery of an event requires a clear and robust concept, which is alighted with the event aims, the needs of the target group and other relevant stakeholders. As part of the event design process, the planning organization is called to ask and answer the 5 W's – what, why, who, where and when.

**Why – what is the event supposed to achieve?**

When taking into consideration the scope of the event and the features within it, there must be continual reference back to the aims and objectives of the event. For example, in the focus of the benchmarking events, it is particularly important to remember that the event is directly connected with the implementation phase of the soci@ll project, thus, particular attention should be paid on attracting participants while paying attention at the activities of the events in relation to the testing phase of the project. In order to achieve the best outcome, it is always a case of balancing aims and objectives.

**What – type and scope of proposed event?**

This requires a detailed consideration of the core or primary activities and features of the event, which will be determined by the type of the event. In addition to the main features of the event, it is also usual to accommodate a range of additional activities running parallel to the event taking place. This helps to increase the scope and attractiveness of the event to different stakeholders.

Some examples of primary and secondary features are: opening ceremony (key note speakers), food and drinks, networking, presentations and other speakers.

Defining the purpose and concept of the event is an essential starting point of the event management process, to ensure the event' success. It is important to brainstorm some aims and objectives of the event and ensure that they are specific, measurable, achievable, realistic and have a time frame (SMART).

**Who – is the event for?**

This requires a detailed consideration of the event target group (potential audience) both in terms of their characteristics and also the number of people the event seeks to attract. The organizer of the event needs to know as much as possible about the target audience of the event such as:

- Who are they?
- How will they travel to the planned event?
- What type of events do these people go to?
- What will they expect at the event in terms of facilities and amenities?
- What proportion of new participants and repeat participants are there?

- How often do they go to events?
- Is there a price fee? If yes how and when do they buy tickets?
- How big should this event be?
- What type of capacity will you be catering for?

These are just some starting questions that the event planner should be asking about the audience of the event.

**Where - location and venue?**

When planning and delivering an event there are two broad decisions that needs to be taken. These are location and venue selection. The location relates to where the event takes place (specific city, town, village or geographical location), while the venue is the actual site of the event.

Decision over where an event should be held may be relatively simple of complex depending on the requirements of the event itself. Nevertheless, regardless of size, decision of venue and location must relate back to the events purpose and aims, whilst also conforming the selection criteria below:

- Marketing – match needs of target audience
- Functional – size and capacity, layout and design
- Operational – Access, stage size, power, water, facilities, parking, ticketing
- Risk management – safety and control, emergency provisions, infrastructure
- Financial – affordable within budget
- Aesthetic – attractive and complementary of event.

In addition to the venue itself, it is important to consider external factors when selecting a venue. These could include:

- Hotels and accommodation supply in the surrounding area for the participants / visitors
- Access routes to the location and venue
- Drop off and car parking facilities
- Distance from stations / terminals / airports
- Exhibition access / loading areas
- Building development and planned roadworks
- Other events competing the venues, resources and attendees
- Other events likely to create issues for suppliers or visitor access.

Once the planning organization has identified and booked the venue for the event, it is important to create site maps to show the position of various elements within the event.

**When – time of year, day of week, start and finish?**

Target audience, event activities, venue availability, market characteristics and event organiser's preferences help define suitable dates. For example if the target group is school teachers, then school hours must either be avoided or make relevant arrangements for the teachers to be able to attend. Likewise, it must not go on for too long in the day. Depending on the nature of the event, decisions about when to stage it may or may not be an option, as they may be govern by other external factors.

If there is flexibility for the location that the event will take place, then dates must also be selected with due consideration for audiences and resources to stage the event. It is important to have a clear picture of other events in the area/ or relevant to your topic of interest and understand how they will impact on visitor numbers and behaviour in the area and availability of resources such as venue, staff, equipment, event parking spaces. Understanding patterns of supply and demand, will help towards identifying dates to avoid and also potential dates when the event would be more successful.

Finally, the duration and range of activities are closely related, as the longer the duration, the more programming is required. When deciding on the event duration, one must look to the stakeholders involved in the event and their individual needs and expectations. Also, through identifying which elements of the programme can run in parallel sessions and which must be sequential then the desired event duration can be ascertained. In addition to duration of the event, the start and finish times also requires careful consideration with regards to elements such as the target audience, transport arrangements, local traffic conditions, weather and daylight hours.

The following table is a tool that includes all the elements that an event organizer needs to consider when successfully planning an event. This thorough plan has been designed to help the organizer keep on track.

| | |
|---|---|
| **Name of Event:** | **Date & Time of Event:** |
| **Venue:** | **Budget vs Cost of Event:** |
| **Contact(s) of participants:**<br>-<br>**Contacts of Organising Team:**<br>- | **Objective:**<br>- |
| **Target Audience / Name of Participating Schools, individuals and Number of Attendees:**<br>- | **Type of Event (half day, full day):**<br>- |
| **Room Layout:**<br>- | **Catering: YES/NO Details:**<br>- |
| **Speakers: YES/NO Details:**<br>- | **Team Dress Code (eg. School shirts or badges from partner organisation):**<br>- |
| **Type of Communication (eg. Invites, brochures, maps, letter, etc.):**<br>- | **Audio Visual (video recording, microphones, projector, speakers, etc.): YES/NO Details:**<br>- |
| **Name Badges: YES/NO**<br>- | **Transport: YES/NO**<br>- |
| **Media Opportunities: YES/NO Details:**<br>- | **Social Media Coverage:**<br>- |
| **Additional Requirements: Photos/Decoration/Signage/Authorisations Details:**<br>- | **Advertisement on Website: YES/NO**<br>- |

## 2.2 Develop an event management plan

Planning is the most important part for running a successful event. Event management is the activity that encloses all the tasks and activities of planning procedure along with possible issues associated with the event, as well as problem solving and setting a plan for handling them. The event management plan must include the following important documents:

Key objectives and measures:

- Project plan/critical path and/or task list showing all the tasks required to deliver the event
- Project budget
- Program agenda
- Site plan and other details about the venue
- Traffic management plan

- Event promotion/marketing

Within the following section there are guidance notes for event organizers to help them develop a detailed event management plan.

## Event management plan[1]

### Event overview

| |
|---|
| Provide a brief summary (one or two paragraphs) of what your event will involve. |

### Licence and application checklist

*Use the checklist below to record the licences and permissions you have applied for.*

| Checklist | Yes | No | N/A |
|---|---|---|---|
| **Any licensing requirements (provide details) consents and licences** | ☐ | ☐ | ☐ |
| **Have you checked if your event requires planning permission? (provide details)** | ☐ | ☐ | ☐ |

### Key event management contacts

*Complete the following table with the names, roles, responsibilities and contact details of the stakeholders involved in the event planning process. Add more lines if necessary.*

The event manager has the overall supervision for all the components of the event. Depending on the nature and scale of the event, other people might be involved, thus, the role along with their responsibilities should be recorded.

| Name | Role | Responsibility | Contact Details |
|---|---|---|---|
| | Event Manager | Overall responsibility | |
| | Production | All event infrastructure, ordering, delivery timings etc | |
| | Volunteer Coordinator | Volunteer recruitment, training and event day management | |
| | Steward Coordinator | Recruitment, training and event day management | |
| | Health and Safety Officer | Risk assessments, legal compliance, fire points, site inspections, first aid provision | |
| | Welfare | Toilets and wash facilities | |
| | Waste Management | Organisation of waste clearance and recycling | |

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[1] Based on the Cornwall Council's Event Planning.

### Key event contacts – other

*Complete the table below with information of other key contacts for the event.*

This section is for the organizer's use and will help with the event planning and management on the day. The following table should include details of everyone who will be involved with the event, such as suppliers, media and so on.

| **Suppliers (catering etc)** | | | | |
|---|---|---|---|---|
| **Organisation** | **Contact** | **Service** | **Contact details** | **Notes** |
| | | | Email and mobile | |
| **Authorities (fire, police, first aid etc)** | | | | |
| **Organisation** | **Contact** | **Service** | **Contact details** | **Notes** |
| | | | Email and mobile | |
| **Media coverage** | | | | |
| **Organisation** | **Contact** | **Service** | **Contact details** | **Notes** |
| | | | Email and mobile | |

### Staffing

*To plan and successfully run an event it is essentially to make appropriate estimations on how many staff will be required throughout the event organization.*

Please list the other staff who will be needed in order to run the event, in addition to the key event management contacts listed above.

### Organisational structure

*Create a simple organisational structure below.*

The organisational structure will help everyone involved with the event to understand who is responsible for what. It is also an essential part of the emergency response planning in the case an incident occurs. This list will let everyone know who is in charge for what.

The example below is a very simple structure.

| **Organizational structure** | | | |
|---|---|---|---|
| Role/position | Name | Contact detail | Availability (Date and time) |
| | | | |
| | | | |
| | | | |

### Programme Schedule

*Complete the event schedules below.*

It is necessary to make a list with everything that needs to be done before, during and after the event. This will help ensure that all tasks are completed on time and that things aren't forgotten.

The schedules below each show an example of a typical task.

| Schedule XXXXXX event – prior to event day | | | | | | |
|---|---|---|---|---|---|---|
| **Date of entry (optional)** | **Task** | **Responsible person** | **Deadline** | **Notes** | **% Done** | **Completed (✓)** |
| | Name/theme/title | | | | | |
| | When: Date & times | | | | | |
| | Where: Venue | | | | | |
| | Organizer(s) | | | | | |
| | Funder(s) | | | | | |
| | Logo(s) | | | | | |
| | Website [if applicable] | | | | | |
| | Invited speaker(s) | | | | | |
| | Presenter(s) | | | | | |
| | Accommodation | | | | | |
| | Pick up (taxi) | | | | | |
| | Announcement / invitation | | | | | |
| | Structure of workshop | | | | | |
| | Designer: contact, deadline for the draft, for final | | | | | |
| | Handouts to be given a the event | | | | | |
| | Banners / posters | | | | | |
| | Certificates (design) | | | | | |
| | Certificated (printed) | | | | | |
| | Press releases | | | | | |
| | Advertisements in magazines / journals / newspapers | | | | | |
| | Distribution list: email and post | | | | | |
| | Invitation sent: email and post | | | | | |
| | Programme printed and ready for dissemination | | | | | |
| | Brochure / leaflets / posters / banners (printed) | | | | | |
| | Book catering | | | | | |
| | A central unit to receive and track replies, handle bookings and act as a communications centre. | | | | | |

| | | | | | | |
|---|---|---|---|---|---|---|
| | Registration desk / chairs | | | | | |
| | Overhead projector and microphones, voice recorder and cameras for photos | | | | | |
| | Lab assistant on the day | | | | | |
| | Stands for banners | | | | | |
| | Guiding labels to rooms | | | | | |
| | Presentation kits | | | | | |
| | Folders | | | | | |
| | Pens | | | | | |
| | Pads | | | | | |
| | Projects or organizations flyers | | | | | |
| | Agenda | | | | | |
| **Schedule XXXXXX event – event day** | | | | | | |
| **Date of entry (optional)** | **Task** | **Responsible person** | **Deadline** | **Notes** | **% Done** | **Completed (√)** |
| | Set up the registration desk / chairs | | | | | |
| | Set up the flyers/information booth with banners and posters | | | | | |
| | Check the overhead projector and microphones, voice recorder and cameras for photos | | | | | |
| | Bring the logistical outline, production schedule, directions, phone numbers, food orders, seating charts, name tags, table assignments, guest lists, and the event supply box with you | | | | | |
| | Check the facilities | | | | | |
| | Set up event venue with tables, signs, awards, etc. | | | | | |
| | Relax and smile | | | | | |
| **Schedule XXXXXX event – post event** | | | | | | |
| **Date of entry (optional)** | **Task** | **Responsible person** | **Deadline** | **Notes** | **% Done** | **Completed (√)** |
| | Send thank you notes to staff, volunteers and vendors | | | | | |

| | | | | | | |
|---|---|---|---|---|---|---|
| | Finalize billing and prepare final budget, if necessary | | | | | |
| | Conduct event meeting to discuss success or ways to improve in the future | | | | | |
| | Survey attendees, if appropriate. | | | | | |
| | Press releases | | | | | |

**Timetable**

*Use the table below as a template for the event's agenda.*

If the event will have activities taking place at different times and locations across the event site, it is important to plan them as well.

For example there might be two parallel workshops.

| **Time** | **Agenda Item** |
|---|---|
| | **DAY 1 – Thursday, 10th May 2018** |
| 9:00 - 9:30 | • Registrations/Coffee |
| 9:30 – 10:00 | • Welcoming Messages<br>• Participants' Introductions |
| 10:00 - 10:30 | • Presentation 1<br>*Presenter's name, presenter's position, presenters organization* |
| 10:30 - 11:00 | • Presentation 2<br>*Presenter's name, presenter's position, presenters organization* |
| 11:00 - 11:30 | Coffee Break |
| 11:30 - 13:00 | • Presentation 3<br>*Presenter's name, presenter's position, presenters organization* |
| 13:00 – 14:00 | Lunch Break |
| 14:00 – 14:30 | • Presentation 4<br>*Presenter's name, presenter's position, presenters organization MMN Team* |
| 14:30 – 15:00 | • Presentation 5<br>*Presenter's name, presenter's position, presenters organization* |
| 15:00 - 15:10 | Coffee Break |
| 15:10 - 16:00 | • Worksop ...<br>*Presenter's name, presenter's position, presenters organization* |
| 16:00 | 1st day conclusions |
| | **DAY 2 – Friday, 11th May 2018** |
| 9:00 - 9:30 | Registrations/Coffee |
| 9:30 – 09:45 | Review and reflection of the 1st Day |
| 09:45 - 10:00 | • Presentation 1<br>*Presenter's name, presenter's position, presenters organization* |
| 10:00 - 10:15 | • Presentation 2 |

| | |
|---|---|
| | *Presenter's name, presenter's position, presenters organization* |
| 10:15 – 10:45 | Coffee Break |
| 10:45 – 12:45 | • Presentation 3<br>*Presenter's name, presenter's position, presenters organization* |
| 12:45 – 13:00 | Conclusions |
| 13:00 - 14:00 | Lunch |

**Communications**

There are three main areas of communication for your event:

- Communicating with your audience prior the date of the event.
- Internal communications on the day of the event.
- Communicating with your audience on the day.

**Event communications – audience prior the event**

Please document how the target audience will know about the event plans here.

**Event day communications – internal**

Clear communication plan is highly recommended, while the event organizer needs to ensure that everyone is familiar with the plan. In addition, it is equally important to document the necessary communication equipment for that day. This could include radios, mobile phones and cameras.

- Ensure that there is a phone contact list within the plan.
- Ensure that everyone working on the event is aware of the Organisational structure and knows who to contact if they need to report an incident or pass on information.

Please document the event day communication plan for the staff here.

**Event day communications – audience**

This could include flyers, site plans, signage, public address system, stage schedules and information points.

Please document the communication plans with the target audience on the day here.

**Provision of food**

Document details of any catering and or food planned to provide at the event here.

**Site plan**

*Please include a copy of the site plan within this document.*

A site plan for the event must be submitted; the more accurate and detailed the plan, the better.

You may want two versions of the site plan, one for event participants on the day and another for your management team. An accurate site plan will help you direct people to the correct part of the site when they arrive to set up. A site plan will also help you plan how people will enter the site and move around it.

**Media**

| |
|---|
| Provide contact details for the media advertisements and activities. |

**Traffic, transport and parking**

Smaller community events will have limited impact on traffic and parking, however it is important to consider this when planning an event. Larger events can have a big impact on local traffic and transport and will require extensive risk assessments and detailed plans dealing specifically with traffic and transport.

- How will the target audience travel to the planned event?
- Consider the various transport links around the event site and how these can be promoted to the audience as a way to get to the planned event.

| |
|---|
| Outline any traffic, transport or parking plans for your event here. |

**Weather**

**Severe weather and event cancellation**

- Consider any weather conditions which may lead the event being cancelled and how can this possible managed.
- How will people be informed in the case the event has to be cancelled?
- How will the event management team decide if weather conditions are too risky for the planned event to go ahead?

| |
|---|
| Please document severe weather and event cancellation policy and procedures here. |

## 2.3 Timing

The timing of the event can be crucial to its success. It is important to find out when other events are taking place near the event's location (region) so that the event does not suffer from poor attendance. In addition, it is equally important to be aware of the public and school holidays. Spring and autumn are particularly popular times to stage local events.

Consideration also needs to be given to the time of day of the planned event. This must fit with the concept of the event and target audience. For example, a family event would not be ideal to start at 9pm or hold it during the heat of the day between 11am and 3pm in the summer months. Also, be mindful of the length of the event as this can impact significantly on costs and participation numbers. Once the date has been identified, a notification to the key stakeholders should be sent..

# 3 Unit 3: Budget line/event's costs and expenses

**Objectives:** The event management is directly linked with the event's financial foundation. Given that budgeting is a critical and challenging aspect of the planning process, aligning appropriate budget allocation is a key for a successful event. Developing an effective budget helps the event organizer to make appropriate decisions and adjustments.

It is important to count for all costs associated with the event's activities. An event planner needs to be sure that there are no overspendings on the set amount, unless there is an income to cover the expense. When considering the financial aspect of an event budget, it is essential to include the following elements where appropriate:

- Venue hire
- Equipment hire (for example, staging, flip chart, markers, tape and so on)
- Marketing and promotion
- Catering
- Salaries and fees
- Travel and accommodation
- Administration (for example, telephone, postage and art supplies)
- Contingency factors

This unit will help participants to develop an event budgeting strategy, as well as to familiarize them with the budget details of an event organization.

## 3.1 Event budgeting strategy

In order to create an event budget, it is essential to establish a strategy that follows certain best practices while keeping in mind a streamlined process.

**Step 1 – establish the goals of the event and review the event's needs**

Before "getting lost" into the event expenditures and vendor research it is important to identify the most value elements of the event. The main purpose of the event budget is to help towards the properly funds allocation rather than keep track on the spending. Thus, all key components of the event vision and objectives should be identified prior to the budget planning in order to reflect those needs on the financial plan. For example, should an event focuses on a training workshop, it is important to secure a venue that allows multiple rooms with certain specifications. For that reason, finding an appropriate venue is a big component of the budget plan.

**Step 2 – Look into past events**

In the case that an event marketing strategy has been executed before, it is ideal to utilize all previous data, information, templates and expenses. Previous research and historical data will help put a benchmark budget in place and will make budgeting process much simpler and quicker.

**Step 3 – Stakeholders**

While setting up the financial plan for an event it is important to communicate with all involved stakeholders (as described in Unit 1). Stakeholders are often split into two categories: internal and external.

When it comes to internal communication, it is important to work closely with the event planning team and make sure that all the relevant information have been taken into consideration. Likewise, there must be clear communication and engagement with external stakeholders (event vendors) from an early stage of the budget plan. Communicating with the event vendors can provide an insight to the actual costing of the event. Unquestionably, it is important to collaborate with stakeholders that are appropriate for the event goals, while taking into consideration the financial aspect.

## Step 4 – Estimating the event expenses

Once all the relevant information have been obtained it is time to assemble all the elements of an event budget. The most effective way to do so it is to go through the lifecycle of the event and breakdown all the important expenses in detail.

Some aspects to consider for the budget line elements are the following:

- **Venue**: Depending on the scale of the event, the venue incurs the largest cost from the entire budget. Consequently, going back to the event management, it is important to make sure that the selected venue aligns with the event's goals.
- **Food and beverage:** If the event taking place allows space for food and beverage then this is also a category that should be included within the budget plan. Within this expense, it should also be included the caterer, waiter(s) fee and/or bartender fee. In some cases this cost is included within the venue cost, still, it is always good to confirm with the venue.
- **Speakers / trainers (subcontracting)**: Speakers or trainers for the event / workshop are also a very important aspect of the event budget. Depending on the needs of the event relevant arrangements need to be made for the speaking panel as means to attract attendees. Speakers, when aligned with the event's vision, are significant components of the event since they represent the event brand as well.
- **On site event staffing**: This is basically the team that will be on set on the actual day of the event. This includes people who will be responsible for the registration desk, setting up the scene and so on.
- **Travelling**: While peaking the venue of the event, certain costs for travel plan of the team might take place. These, along with meals and accommodation should be included within the budget plan.
- **Marketing**: This activity relates to all the means of communication and promotion prior and post the event. Depending on the nature of the event decisions need to be taken for allocating budget for social media ads, traditional marketing, giveaways and so on.
- **Overhead expenses:** These costs are not directly related to the event, yet, depending on the nature of the event activity they need to be taken into considerations. This category includes accounting fees, insurance, interest, legal fees, rent, repairs, supplies, taxes, telephone bills, internet services, travel expenditures, and utilities.

## Step 5 – Event budgeting template

There are several template online that can help with inputting the financial costs together. A simple event budgeting template should include the main expenses in previous mentioned categories. At this stage it is important to input all costs as analytically as possible. For example it is a good idea to define what it is included within staffing cost rather than setting a fixed amount for this category. This will help the event planner to work more effectively and efficiently.

Below there is an example of a budgeting template:

<table>
<tr><th colspan="8">Budgeting template</th></tr>
<tr><td colspan="7">Budget Summary</td><td rowspan="4"></td></tr>
<tr><td colspan="7">Estimated expenses</td></tr>
<tr><td colspan="7">Direct expenses</td></tr>
<tr><td></td><td>Description</td><td>Hours worked / quantity</td><td>Cost per hour</td><td>Total cost</td><td>Category total cost</td><td>%</td></tr>
</table>

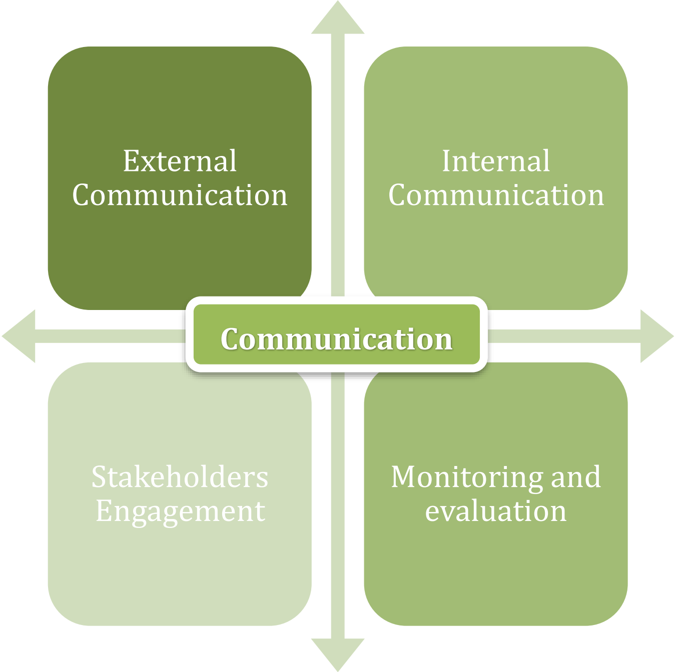
| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **a. personnel** | Staff 1 | *3* | € *10.00* | € 30 | *€ 230* | **13.0** | **Estimated Revenue** | |
| | Staff 2 | *20* | € *10.00* | € 200 | | | | |
| **b. travelling** | *Team transportation to and from the venue* | | | € 100 | € 100 | **5.65** | **a. sponsors** | €*500* |
| **c. equipment** | Cameras for taking photos | *1* | € 300 | € 300 | € 300 | **16.94** | **b. other incomes** | € - |
| **d. venue (rent)** | **Sample Hotel** | 18 | € 40.00 | € 800 | € 800 | **45.18** | | |
| **e. consumables, supplies and general services** | *Beverages* | | € *50.00* | € 50 .00 | € 155 | **8.75** | | |
| | *Finger food* | | € 100 | € 100 | | | | |
| | *Flip chart* | *1* | € 5.00 | € 5.00 | | | | |
| **f. subcontracting** | *Key note speaker* | *1* | € *50.00* | € 50 | € 70 | **3.95** | | |
| | *Presenter 1* | *1* | € 20.00 | € 20 | | | | |
| **Total cost for Direct expenses (a+b+c+d+e+f)** | | | | | € 1,665 | | | |
| Indirect Expenses | | | | | | | | |
| **Overheads** | | | | **€ 115.85** | € 115.85 | | | |
| **Total Cost for Indirect expenses** | | | | | | | | |
| **Total cost of the event = Total cost for Direct expenses (a+b+c+d+e+f) + Total cost for Indirect expenses** | | | | | **€ 1,770.85** | | **Revenue =** | € 500 |

Remember to always store the budget spreadsheet either through Google sheets or Excel. Finally, the budget plan should be made available only to those who need the information. As a general rule, it is advisable to keep finances as confidential as possible.

# 4 Unit 4: Communication

**Objectives:** Effective communication is a vital element in planning an event in terms of better awareness and activities planning.  Successful communication during an event planning aids internal and external flows. Through this Unit soci@ll partners will be able to communicate appropriately the events taking place within the soci@ll project.

Effective communication goes through 4 different pillars, engaging external communication, internal communication, possible stakeholders and supervision of the means of communication (see the table below).



As a general rule, the event communication timeline goes through 7 milestones:

1. pre event marketing – 1 – 2 months before the event
2. invitation  - 2 months to 2 weeks before the event
3. Communication – immediately after the registration is received
4. Reminder – 1 to 2 weeks after invitations have been sent. Send it to non-responders
5. Second reminder – 1 to 2 weeks before the event. Send it to attendees
6. Text message – 1 say to 1 hour before the event. Send it to attendees
7. Post-event marketing – send via e-mail with a feedback questionnaire attached

## 4.1 Pre-event marketing

Prior sending invitations for the events there are activities that aim to engage possible attendees to the planned event. Pre-event marketing helps making a noise about the event before the registration is open. There are many different means of communication such as websites, social media (Facebook, Instagram, LinkedIn, blogs and Twitter) and traditional media (radio, newspaper, magazines, television).

Social media is usually the most effective way to publicize an event and keep the target audience updated. The key for advertising the event through social media is a detail schedule for the upcoming steps. At each step it is important to have specific goals that are intended to be disseminated outside the boundaries of the actual event.

## 4.2 Invitations

Invitations is the most formal way to communicate an event. Like every letter, an invitation letter usually reflects the personality and the values of the event planned. Depending on the type of the event, there is the option to send a public invitation for the target audience, or prepare private personalized invitations. Both methods of invitation are appropriate, while it is important to share them with the possible attendees well ahead of time so they will have the time to make the relevant arrangements to attend. An invitation should be sent out two month to two weeks prior the event is taking place (depending on the scale and type of the event).

Prior sending the invitations, it is important to keep in mind that the event planner needs enough time to send confirmations and reminders about the event.

The invitation for the event (email, post or fax) needs to be simple yet comprehensive. As a general rule, an invitation's purpose is not to enclose all the information details, but to attract the receipt's curiosity. All details will be communicated to the interested stakeholders through the set up communication channels. Thus, an invitation should be short and to the point. The receipt should be able to understand the event's purpose from the first three lines, while the invitation should give them the possibility to get more information from relevant links or references to the event website (registration page).

In addition to this, it is highly important for the receipts to receive the invitation as early as possible. On the one hand, it allows the receipts to plan ahead their tasks and activities in order to attend the event. On the other hand, it allows the event planner time for follow ups, confirmations that relates back to the event planning such as the venue, catering and so on.

Below there is an example of an invitation template:

[Date of sending the invitation]

**Subject**: [a short line about the scope of the invitation]

Dear sir/madam,

With is email we would like to officially **invite you to participate in the two-day meeting of [name of the project]** (website).

**The meeting is planned for the [date], in [location].**

The objective of [name of the event] is to [objective/s].

The aim of this meeting is to [aim/s of the meeting].

The topics that will be discussed are [topics of discussion].

We would greatly appreciate it, if you could inform us on your **availability by [date], so we can schedule our conference meeting accordingly.**

For more information and registration to the event please visit [website] or email to [email].

Additional information on your participation in the meeting, will follow in the next days upon your positive reply.

We would be glad to have you with us in this meeting.

All the best,

[Signature]

## 4.3 Registration

Once the invitation is sent out to the possible attendees, the registration process can begin. Depending on the target group of the event, the registration options can vary (online registration platforms, emails, phone). Regardless of the option the target group will choose to register at the event, it is key for the event planner to manage a single platform with all the inputs. This is highly recommended in terms of future communication of the event's information as well as to have the whole picture in terms of documentation of the event's attendees.

In addition to the above, it is important to keep the registration process as simple as possible. A potential attendee should be able to easily navigate through the registration site, as well as to be able to register easily and effectively. A complex site or registration tool may discourage a participant to enrol or complete their registration to the event.

Below there is a list of information that should be part of the registration tool:

- Name
- Surname
- Organization
- Contact details (mobile number – in the cases one is visiting from abroad)
- Date of arrival (in the case one is visiting from abroad)
- Time of arrival (in the case one is visiting from abroad)
- Date of Departure (in the case one is visiting from abroad)
- Time of departure (in the case one is visiting from abroad)
- Accommodation (name of the hotel in the case one is visiting from abroad)
- Food specifications (Regular Meals, Vegetarian, Allergies, please specify)
- Email

## 4.4 Confirmation

Once registering, attendees should receive a confirmation in order to be reassured that the registration to the event has been successful. Confirmation messages are ideal since they help to establish a relationship with the attendees and they are a great opportunity to provide them with information about the event such as the contact details of the organizer, the agenda, how to get to the venue and the information provided by the attendee when they registered.

## 4.5 Reminders

The goal of reminders is to increase attendance to the event and decrease absence. Nowadays people receive a number of invitations for various topics and events. Reminders are great to keep people updated about the upcoming event, while they target participants who did not register yet. In addition, reminders can act as an excellent communication with the registered stakeholders. One to two weeks prior the event, reminders are essential since the people who have registered to the event might have forgot about it or noted a different date.

Another excellent idea to reach possible attendees or to keep those who have registered updated, besides the email, is a scheduled text message. A short and simple text message few hours before the event can act as a reminder for those who have registered, as well as a welcome note to the event planned. Finally, a text message is more likely to be read or seen rather than an email.

## 4.6 Post-event marketing and communication

Event communication is a process that starts prior to the event date and continues after its completion. Post event marketing is ideal to expand the event experience for those who have attended. A smart way to do so is to prepare a thank you message and share it only with those who have participated.

Another effective way to communicate with the event's participants after the completion of the event, is to share an anonymous evaluation form in order to receive feedback on the planning and implementation of the event. Both thank you message and evaluation form should be send out a day or two after the completion of the event.

Moreover, as part of the post-event marketing, it is ideal to share some presentations, photos and additional material that is relevant to the event's topic. Finally, this is a great opportunity to communicate with the participants upcoming events and activities planned by the organization.

## 4.7 E-mail

Online invitations are useful for a lot of events. They are a great medium for most events where several people are invited. Emails allows the possibility to track who has opened the invitation and see who is attending or can't attend. Another great feature is that there is the option of exporting the list of the people invited into an Excel file.

Email is ideal for small, more casual events. Still, in order to communicate effectively using email services it is wise to use the following tips:

**Subject line:** It is the most important part of your email. Should you wish your email not to be taken for spam, it is essential to have a clear and concise subject line. The importance of the subject line lies to the fact that it helps the receiver know what the email is about before opening it, as well as, it makes the email easily identifiable through other piles of emails.

**Main body:** A general rule is to keep the message short and clear. As everybody have a busy schedule, a long message is more likely to be deleted before read. Thus, it is important to be able to express the subject in as few words as possible.

**"Reply all":** In the case that an email was sent to multiple receipts and you only want to reply to the sender, just select "Reply". There is no reason to overwhelm everyone with information they don't care about by using 'Reply All'.

**Signature:** It is advisable to always use a signature at the end of the email, so that the receipts will be aware of the sender.

**Recheck everything:** Before hitting the 'send' button, reread messages for typos or other mistakes, and make sure attachments are in fact attached. You'll make up the time it takes and more by not having to revisit messages with errors.

**Use professional email address:** When sending a formal email it is important to use an email address that depicts the name and surname of the sender, so that the recipient know who is contacting them and not perceive the email for spam.

**Using CC and BCC:** While not many are familiar with it, Cc and Bcc have their use. The main difference between Carbon copy (Cc) and Blind carbon copy (Bcc) is that with the latter, the recipients do not get to know each other. For instance, putting all your friends' emails in the Bcc field and asking them to meet you at a chosen location would make everyone feel special until they arrive at the venue.

# 5 Unit 5: Measure the event's success

**Objectives:** Through this Unit, participants will be able to explore ways to promote their event such as ideas to engage potential stakeholders in the event. What is more, they will explore ways on using media on the event's advantage as well as to explore ways for measuring the performance indicators for the event's success.

## 5.1 Promotion of the event

As described in previous units, there are several ways to spread the word for the upcoming event. Nowadays, with the increase of technology, the most effective ways to gain attention for the upcoming event is by using, besides the traditional media, the social media.

Depending on the type of the event, there are different means of promotion. The first and foremost task is to **choose the social networks that are more suitable to the event's target audience**. Some social media platforms might be more effective than others depending on age group and interests. Below there is a list of the most common social platforms, along with their usage:

Facebook: It gives the possibility to create event pages, share them and share event updates. In addition, through the paid promotion there is the option to send a target message to specific target groups.

Instagram: Eye-catching images that can help towards promoting a brand.

LinkedIn: A business to business industry (B2B) for networking. The target group is among professional stakeholders and it is a great tool for updates and announcement on an organization's news and events.

Twitter: The targeted posts and event hashtag allows the event organizer to build the excitement before and during an even through.

In addition to the above, when planning an event, a unique, short and to the point **hashtag** helps to promote and disseminate the planned event. By this, any posts made in any type of communication channels will make the event stand out and easily identified by the target audience. The hashtag can be also included in all the relevant promotional material such as emails, printings, banners and so on. What is more, when give people the motive to use the hashtag (through competitions and photo sharing that includes the hashtag), the event gets more recognition and advertisement.

Moreover, while taking actions in promoting the event through the social media, a great idea would be to **have all the social platforms interconnected** and updated with all the event details, websites etc. On the other hand, when updating the social platforms keep in mind the target audience of each social network and use appropriate language, tone and images to gain their attention. When making an activity in the social media always keep in mind that **the content for each social network differs according to the audience**.

Another great way to gain attention for the upcoming event is to have **paid social media ads** as well as **build relationships with people** who can positively speak about the planned event and help influence possible attendees to the event.

Finally, on the actual day of the event, use **live video** to make a noise on the event taking place. By this it does not mean that the whole event will be livestreamed, yet, key sessions or happening could be shared within the social media.

## 5.2 Performance indicators

Media is a great means of promoting an event. To know and understand the appropriate use of social media engagement it is essential to remember that they relate back to the goals and objectives on the event planned. The importance of measuring the performance indicators of an event promotion through the social media is a vital process of the strategic plan. This is because, according to the goals set at each stage there are different parameters an event planner needs to control.

Further there is a table[2] demonstrating the metrics an event organizer needs to take into consideration for each stage of the event preparations.

| EVENT PHASE | MARKETING OBJECTIVE | MARKETING EXPECTED RESULT | EXAMPLE SOCIAL MEDIA METRICS |
|---|---|---|---|
| Before event | Increase event awareness among target audience. | Awareness | • Impressions of social posts.<br>• ·Reach of social posts.<br>• Social handle follower/fan growth.<br>• Number of social mentions of event hashtag and event name.<br>• Video views. |
| Before event | Increase event understanding and consideration among target audience. | Familiarity, Consideration, Comparison | • Social engagements: likes, comments, shares.<br>• Social conversations e.g. number of replies to event Twitter handle, comments on Facebook posts and direct messages to your social channels.<br>• Social content consumptions such as photo and link clicks.<br>• Engagement per 100 fans/followers.<br>• Reach engagement rate/engagement rate of social posts.<br>• Liking of offers or promotions for tickets (if any).<br>• Visits to website from social traffic.<br>• Number indicated 'interested' or 'attending' Facebook Event. |
| Before event | Sell tickets for event, or for free events increase event registrations. | Purchase/ registration | • ·Conversions from each social channel.<br>• Cost per acquisition for each social channel.<br>• Increase of registrations |

According to the demographics of sproutsocial (2017), "each business has their own unique audience identity, but that segmentation might not pan across each social media network successfully". Across the variety of social media that exists today, it is important to know and understand the reach of target audience (demographics data) per social network. Based on the results of sproutsocial, the most visited networks are Facebook, Instagram, Twitter, LinkedIn, Pinterest and Messaging Apps (see the following tables below).

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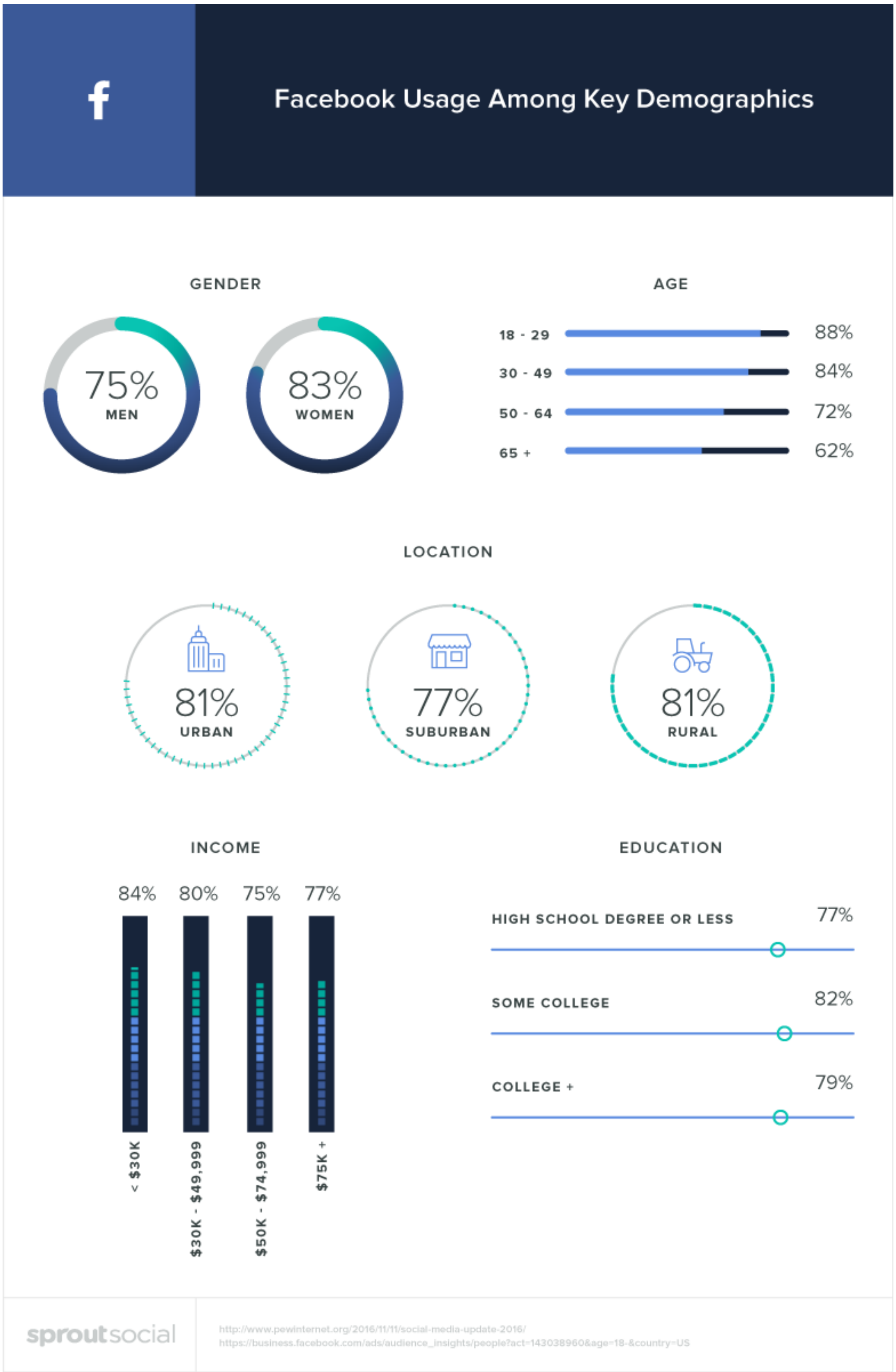
[2] The examples shown at the table were taken from the table prepared by theEventbrite (2018) at: https://www.eventbrite.co.uk/blog/the-roi-of-social-media-for-events-ds00/

Note: Despite the demographics for the social media channels shown below, the choice for which social media to select for an event dissemination, lies on the engagement rate and clicks of each organization.


Facebook Usage Among Key Demographics

http://www.pewinternet.org/2016/11/11/social-media-update-2016/
https://business.facebook.com/ads/audience_insights/people?act=143038960&age=18-&country=US

Figure 1 – Facebook usage among key demographics

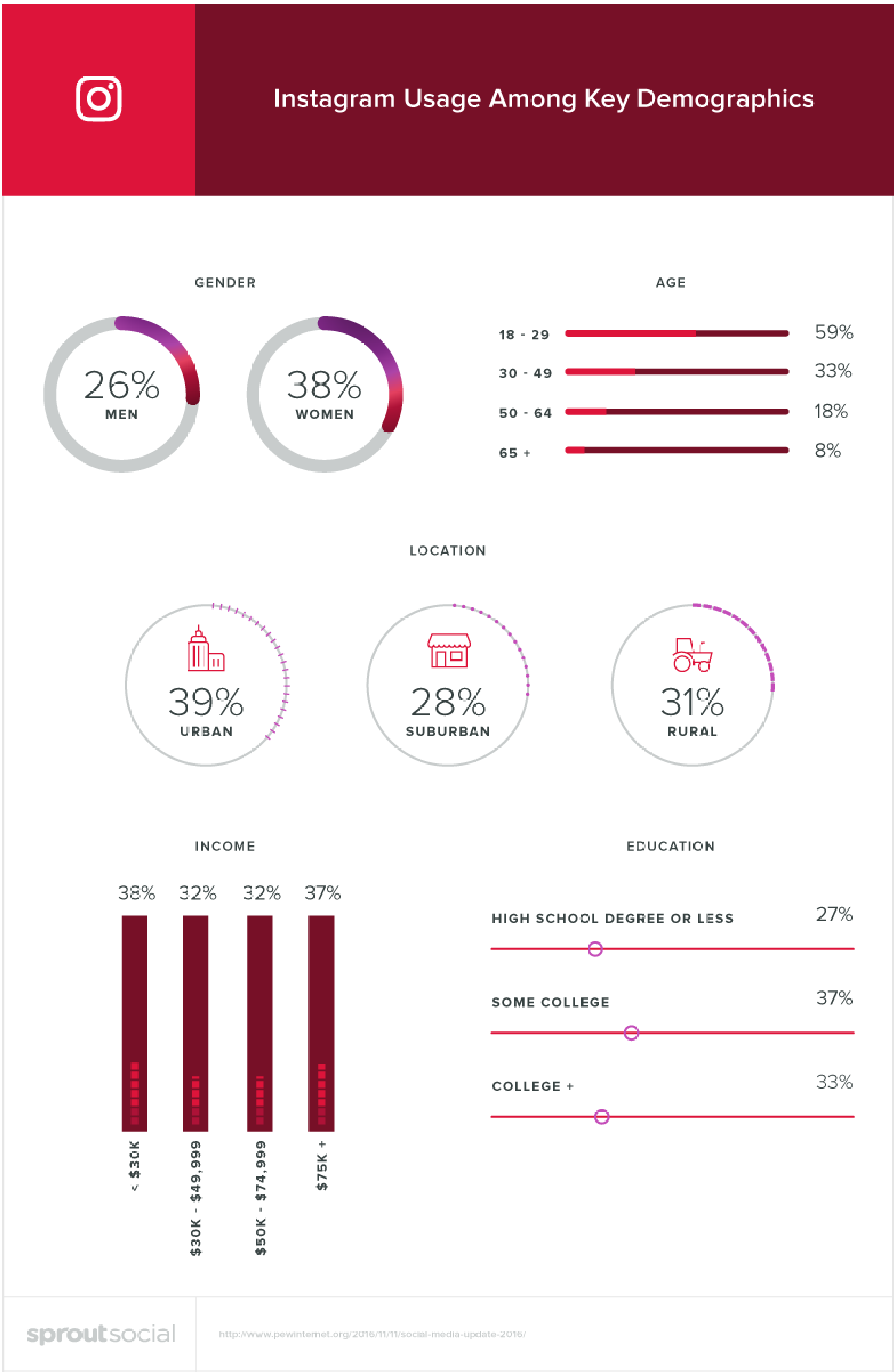


Figure 2 – Instagram usage among key demographics

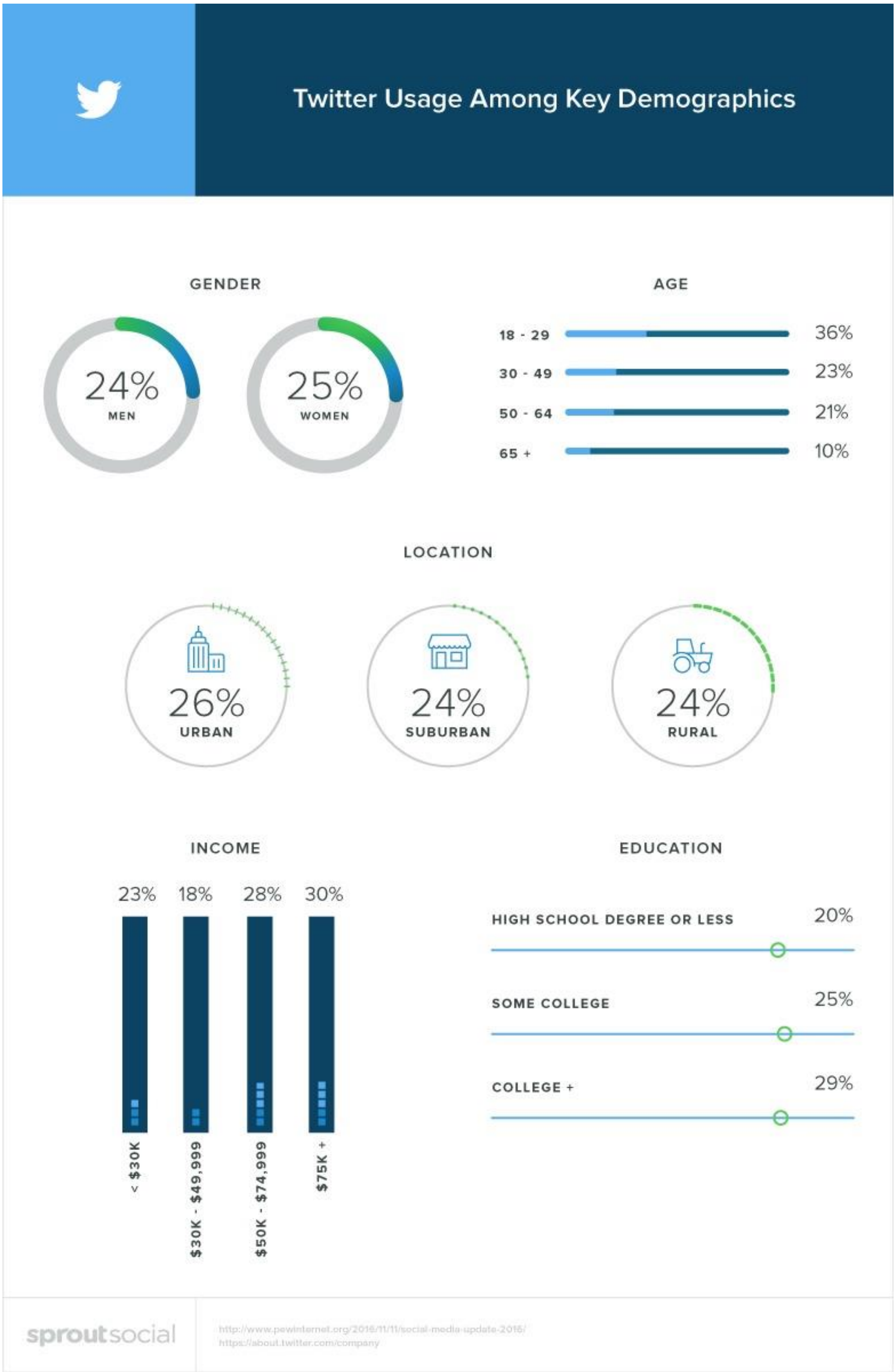
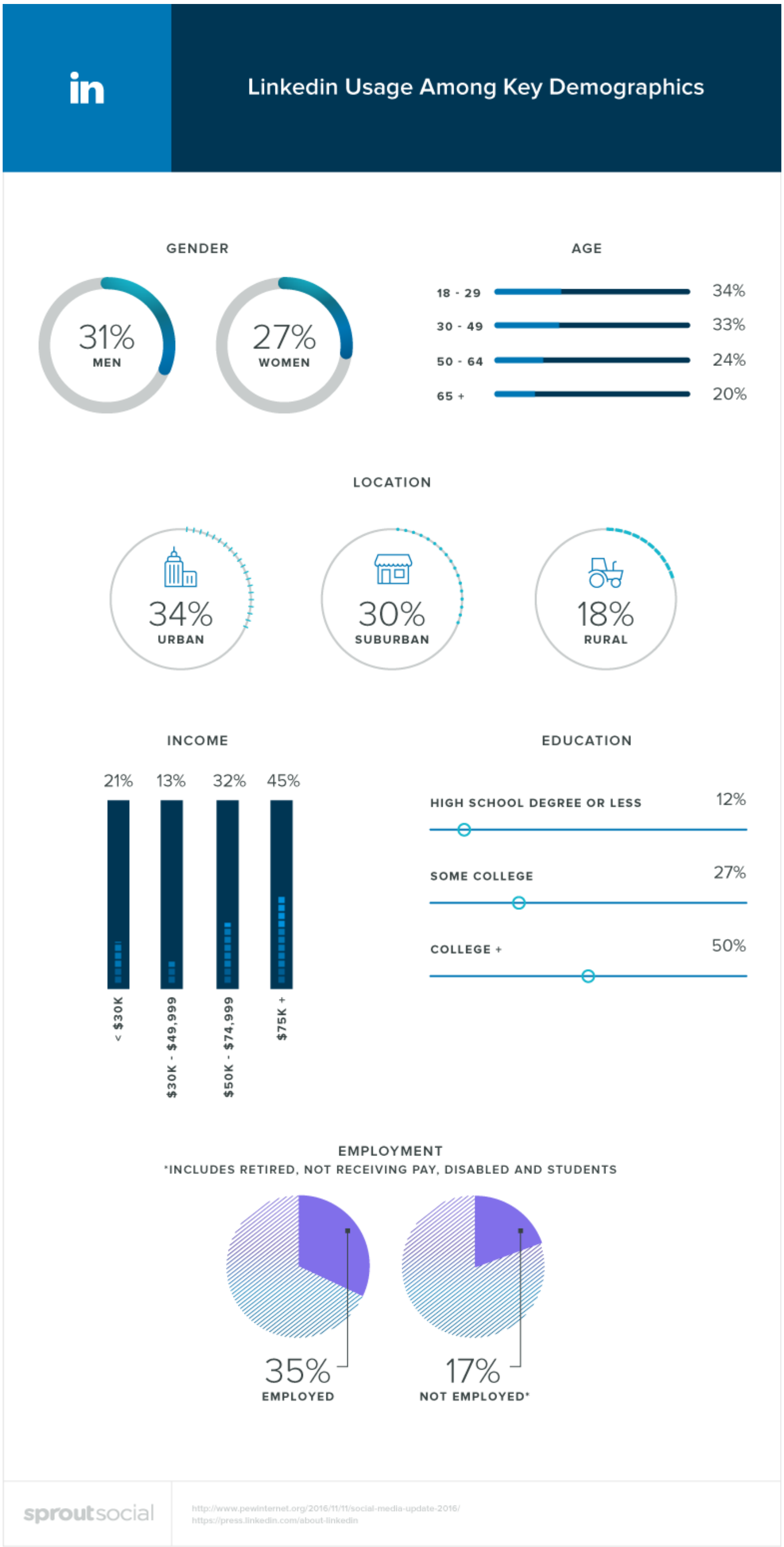


Figure 3 – Twitter usage among key demographics



http://www.pewinternet.org/2016/11/11/social-media-update-2016/
https://press.linkedin.com/about-linkedin

Figure 4 – LinkedIn usage among key demographics

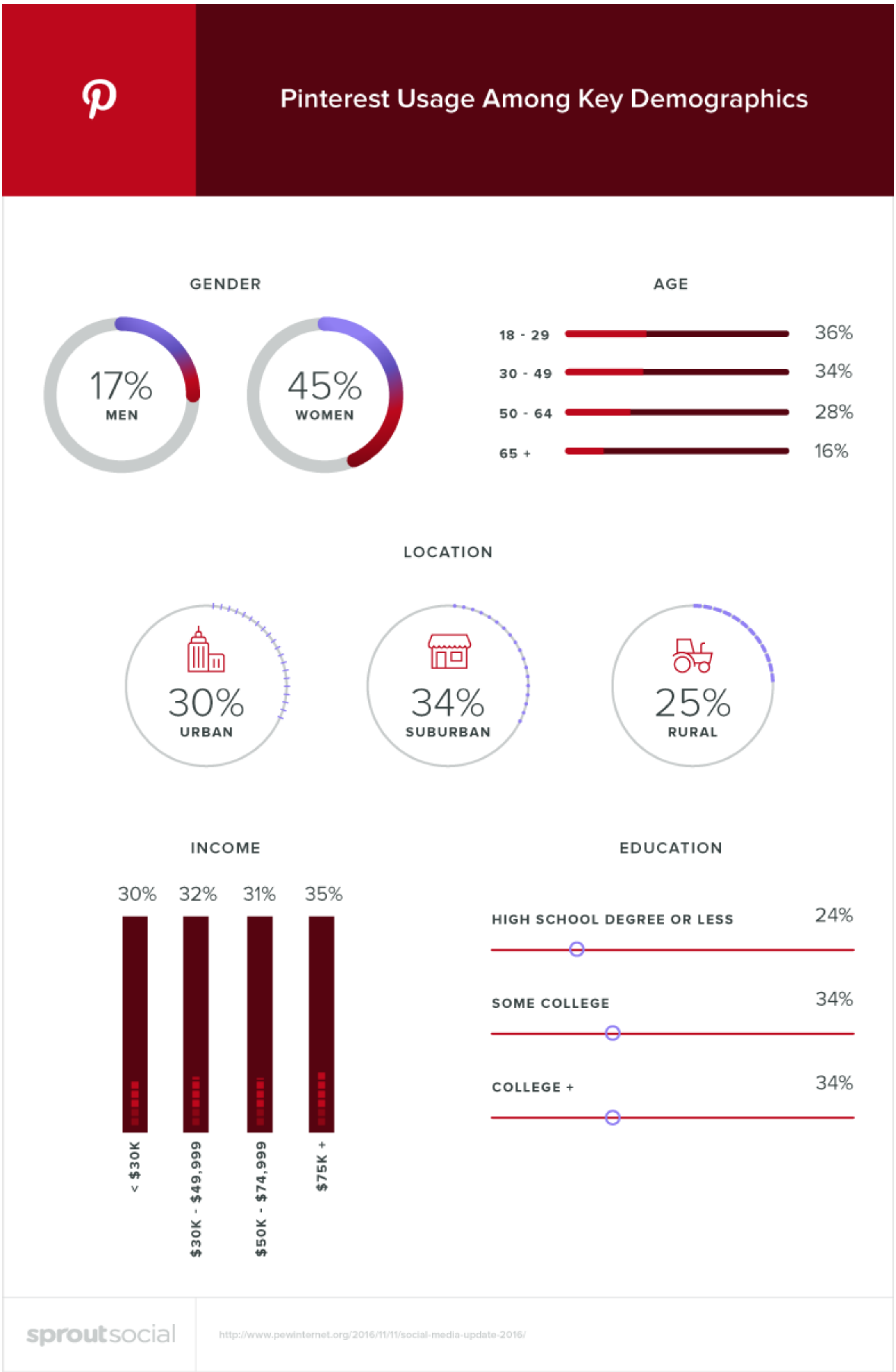


Figure 5 – Pinterest usage among key demographics

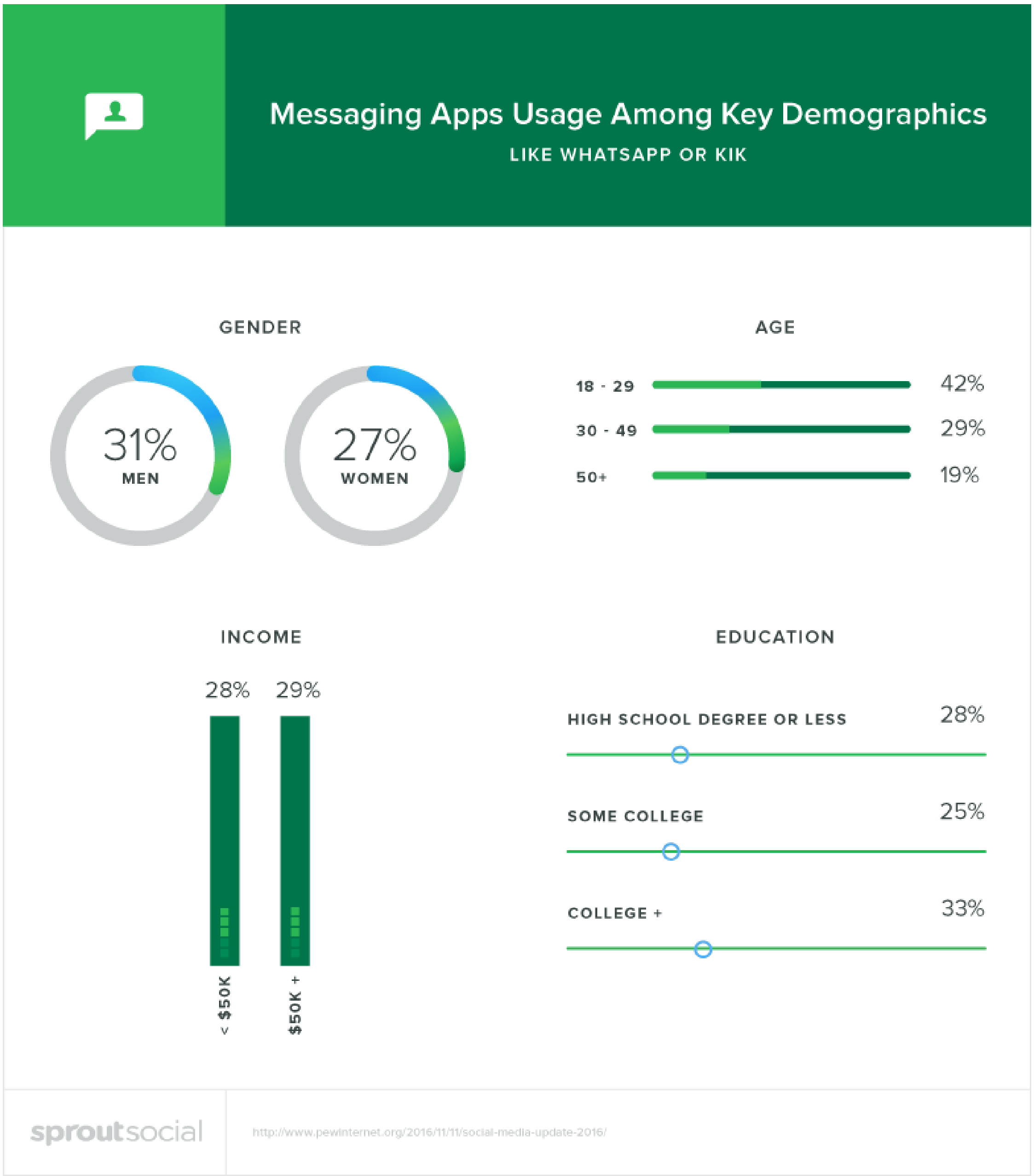


Figure 6 – Messaging apps usage among key demographics

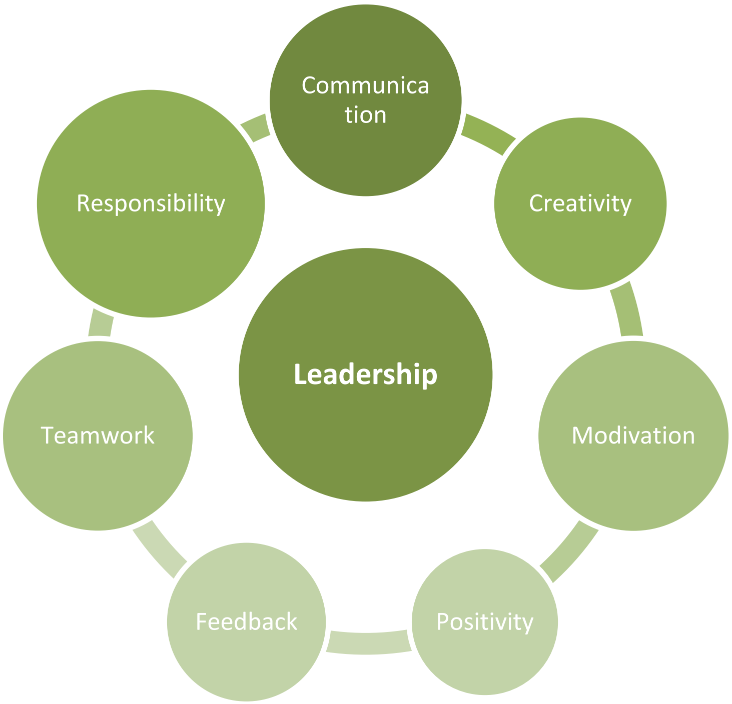
# 6 Unit 6: Assessing your strengths

**Objectives:** through this unit soci@ll partners will learn through practical tools leadership and management skills in real life situations. Therefore, through this unit partners will learn leadership and management techniques, get the best performance from them and others, communicate their goals with greater clarity and confidence, properly plan prioritise and delegate tasks, acquire effective time management skills, improve their motivation self-confidence and self-control, and finally create and sustain a positive work atmosphere in the rest of the team. This unit will help soci@ll partners to coordinate and manage the project tasks, activities and events efficiently.

## 6.1 Leadership skills

The ability to lead efficiently under any situation is required not only for the professional development of a person, but for the positive interaction with individuals or teams. Leadership skills capacitation helps to build confidence and paves the way for future inspirational leaders. By acquiring leadership skills, a person or an organization can become familiar with essential leadership soft skills that can help them stand out.

Leadership is characterised with a set of soft skills such as communication, creativity, motivation, positivity, feedback, teamwork and responsibility. Further in this unit there is a thorough review of these soft skills and their importance in cultivating a leadership spirit.



**Communication**

“The imparting or exchanging of information by speaking, writing, or using some other medium.” Oxford Dictionary.

As one of the many qualities characterising a leader, communication is the ability to communicate effectively with other people. Communication is an important process when expressing information, behaviour, feelings and thoughts. In addition it helps to understand and respond to other’s feelings, thoughts, knowledge and behaviour.

Communication can be classified in many forms:

- Verbal (sounds, language and tone of voice)
- Aural (listening and hearing)
- Non-verbal (facial expressions, body language and posture)
- Written (journals, emails, blogs and text messages)
- Visual (signs, symbols and pictures)

A leader needs to clearly communicate a message to its team as well as to understand the team's respond. Thus, a leader should develop a combination of the above communication forms, as well as build appropriate communication channels via phone, email, social media etc. Verbal and non-verbal communication is the most common form of communication since it combines oral, gestures and body language.

Another quality characterizing a leader who is able to communicate appropriately, is the ability of being an engaged listener. Most of the people focus on what they want to say, while effective communication is achieved through understanding the information communicated to them, as well as interpreting the emotions the speaker is trying to pass to them. Active listening requires no interruption of the speaker as well as self-reflection and comprehension to what it has been said.

Furthermore, as a means of successful communication when discussing with another person, a leader should ask questions. This shows an interest to the discussion topic as well as it helps avoiding misunderstandings between involved persons. Hence, in order to help a person to listen carefully, when speaking, it is important to speak clear, succinct and use plain words.

Finally, no matter what the topic of discussion has been, by the end of the discussion, it is advisable to always clarify and summarize the things discussed. This procedure acts as a confirmation to the points discussed and the way they were perceived by all partners.

### Creativity and positivity

Thinking out of the box is a quality rarely found today. Creativity is essential to a leader when it comes to taking decisions and problem solving. Creative thinking often inspires teams and individuals in a positive way. When planning a new project or an event, it is usual to find obstacles and difficult moments. Yet, a happy and healthy environment can input to a positive attitude from all involved parties as well as to make them more willing to be part of the project/event without taking into consideration the frustration and long hours that might encounter.

### Motivation

A leader who cultivates a creative and positive space, can also be a great motivator. There are several motivators to inspire the passion and encourage the productivity of a person or a team. Some ways to drive the motivation of a team is to allow employees autonomy for decision making and delivery of a task or activity, asking for their input and ideas, assessing their interests, taking their concerns into consideration, recognize their work and giving credit to their efforts, understanding their differences and seeing them as a individuals with different personalities who work together as a team.

### Teamwork

A team is usually established when individuals work together towards a mutual plan, project or a problem solving. While the individuals who form a team have a common goal and interest, working in a team, or leading a team, becomes very challenging. Each member of the team has its own skills, background, experience and education. While it is expected from all to contribute and be fully engaged, it entails effort and commitment. Nevertheless, the dynamics of a team can greatly benefit an organization or productivity since it brings together combined drives and strengths of the people involved. Thus, leading a team requires to understand the teams concerns, listen to their ideas carefully and setting common goals for all involved parties.

What is more, in order to establish a team with dynamics and potentials, each team member should be allocated tasks according to their expertise and capacity. Valuing and embracing the team's diversity can greatly benefit the productivity of a team while the tasks undertaken can become compelling.

Finally, for a team to perform well, it is essential for the leader to create a positive, pleasant and learning and development environment that can motivate his/her team members. A good atmosphere along with encouraging feedback can help team's qualities flourish as well. People will feel confident to speak and make their own decisions on the benefit of the common goal.

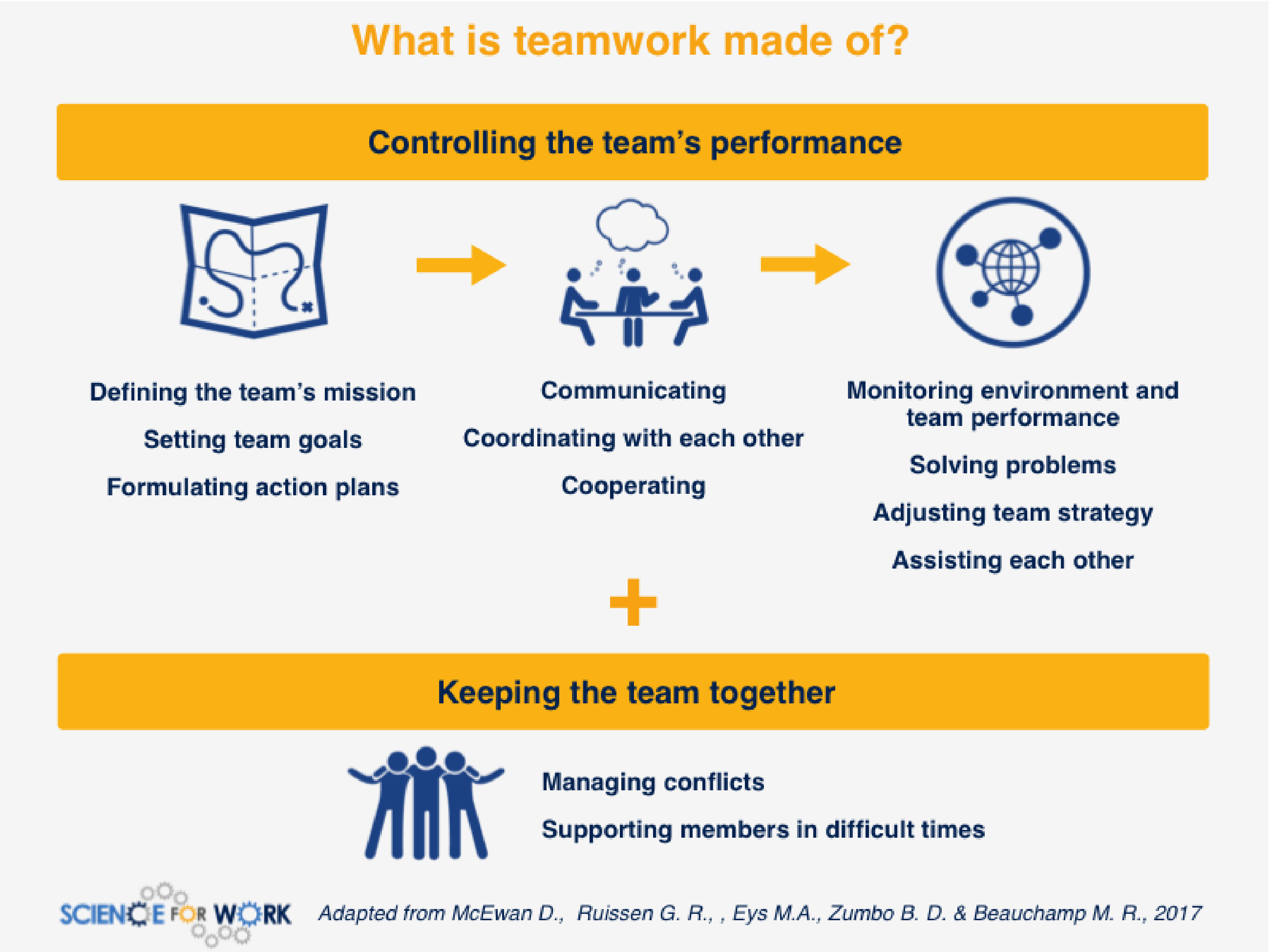

What is teamwork made of?
Controlling the team's performance
Defining the team's mission
Setting team goals
Formulating action plans
Communicating
Coordinating with each other
Cooperating
Monitoring environment and team performance
Solving problems
Adjusting team strategy
Assisting each other
+
Keeping the team together
Managing conflicts
Supporting members in difficult times
SCIENCE FOR WORK
Adapted from McEwan D., Ruissen G. R., , Eys M.A., Zumbo B. D. & Beauchamp M. R., 2017

Figure 7 – What is team work made of?

**Responsibility**

Nowadays, being a responsible leader and taking accountability for both failures and successes is an ability. Responsibility is a great quality that among others, makes a true leader. This means, that responsible leaders are to the position to acknowledge their mistakes and avoid making excuses. In addition, they are dedicated to their goals from the beginning until the end, while they always find ways to help and inspire the people around them.

Responsible leaders also means that they are not afraid of making mistakes and that they are ready to accept the consequences.

The most important outcome of taking responsibility and accountability of an issue is that it helps to the resettlement of the crisis. This is essential because people continue to work and resume their productivity levels without being affected from the background noise.

## 6.2 Management skills

**Strategic management and planning skills**

As it happens in all organizations the development of a strategy for an effective methodology to existing activities and upcoming activities is critical. Managers, leaders or couches count on their strategy in order to further communicate directions and guidelines to the staff members or teams.

Strategic planning for a project, an activity or an event have the same alignments: to achieve the goal in the most effective and efficient manner. In order to do so, strategic planning, requires to understand the issues, challenges and the target group. A successful strategy is often characterised by focus, responsibility and results. Strategic planning often confused with other forms of planning. Strategic planning simply focuses on setting a common ground, identifying priorities and challenges as well as seeing the opportunities for the activity planned.

Performing a business SWOT analysis is a great way to start with the planning process. The following table is an example of a Business SWOT analysis. When performing a SWOT analysis it is important to be realistic, honest and rigorous.

| STRENGHTS | WEAKNESSES |
|---|---|
| • What potentials does your organization have?<br>• What do you do better than others?<br>• What are some of the unique resources your organization is characterized with?<br>• What do others see as your strength? | • What could you improve?<br>• What should you avoid?<br>• What others see as your weakness?. |
| **OPPORTUNITIES** | **THREATS** |
| • What good opportunities can you see in your organization?<br>• How can you turn your strengths into your opportunities? | • What obstacles do you face?<br>• What are your competitors doing?<br>• Do your weaknesses could become threads to you? |

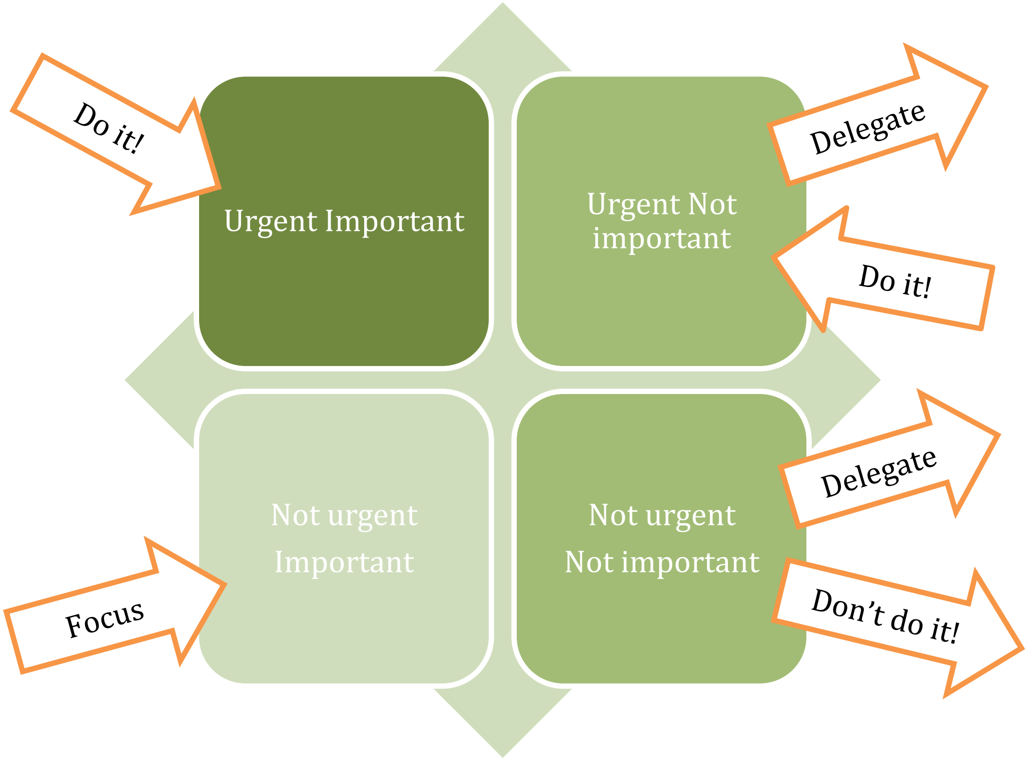
Once the SWOT is done, planning requires tactic organizational structure and allocation of the human resources in order to reach the set goal. The planner should also present the planning map to the involved parties as well as to develop initiatives. Finally, part of the planning process is to assign responsibilities and establish a monitoring plan.

**Time management**

Time management constitutes the set of skills of a person, who can plan his/her activities and has control over the time that is spent on each specific task in order to maximise the production, effectiveness and the time-efficiency.

For example, a person has a good balance with regards to the time, if he/she can manage to spend enough time for his/her social life, work life, family, personal hobbies and all other commitments.

In the case of a project implementation or an event planning it is the process of organizing time commensurate with the planned activities. Time is a non-renewable resource, thus, planning is required to maximize productivity. This involves planning and organizing daily tasks into specific time periods to increase efficiency. Effective time management can give the impression of increasing one's available time because task lists get completed within set hours freeing up time later in the period for other things. Within organizations, time management seeks to reduce wasted time by prioritizing projects and work that have the greatest impact on financial goals. Employee time is engaged strategically to maximize revenue. Tools for effective time management include setting goals, creating lists, using calendars and ranking tasks.



Time management is an essential skill for managers. Strategic business management, project management and operations management are just a few of the areas where effective time management is critical for success. While paying so much attention to time management, procrastinations are also particularly important. This might relate to lack of motivation on completing a task, lack of knowledge and fear to the unknown or simply because it is not important to be done.

What is more, attention should be paid to time wasters such as emails, internet, text messaging, social media, disorganized meetings, interruptions, failure to delegate and so on. In order to avoid time wasting, efficient time management suggest to:

- Tackle the hardest tasks when being most alert and productive (usually early in the morning)
- Ignore emails – check them in the afternoon or when productivity is in a low rate
- Turn off alerts, reminders and notifications during work time
- Let colleagues, family and friends know your schedule
- Keep the work area clean and tidy
- Learn to say no and to ask for help when needed
- Keep phone calls short

- Disconnected from technology

Instead choose to use time efficiently through:

- Effective planning
- Setting goals and objectives to self
- Setting deadlines
- Delegation of responsibilities
- Prioritizing activities taking into consideration their importance
- Spend the right time on the right activity

Effective time management will lead to:

- Improved productivity through improved use of time
- Better performance in terms of on time delivery to external stakeholders
- Increased profitability through better use of the human and non-human resources
- Better alignment of activities by incorporating a time bound system for coordination of tasks and projects
- Reduction of stress that arises due to crisis managements by reducing the incidence of crises by better planning

All in all, when it comes to time management, it is important to have set an excellent planning system and make the most use of it. In addition, it is important to set realistic goals and schedule tasks and activities accordingly. The key is to not overcommit and set agreed priorities to distinguish between urgent and important tasks. Allow some flexibility to deal with unexpected factors as well as keep track to the documents, calendars and workspace.

## Negotiating and Conflict management skills

"Negotiation is a process which takes place when two or more independent parties who have different needs and goals, work together to find a mutually acceptable and beneficial outcome" (Camevale, 1992). Negotiation skills requires the use of many complex soft skills such as analytical skills, communication skills and entrepreneurial creativity.

Negotiation management applies in a vast majority of personal, business and public situations. In the case of soci@ll project planning and implementation activities, you might find yourself negotiating task workload and deadlines with the consortium, or perhaps negotiating the planning of an event and the breakdown activities that go together with this. Regardless the context of negotiation, the principles remain the same at all times. Negotiation is all about communicating for the purpose to reach to an agreement effectively.

Thus, negotiating is often difficult due to the following facts:

- The parties involved often tend to get too emotional on supporting their point of view,
- The persuader tends to focus on personalities rather than focusing on the issues under discussion,
- Not listening carefully and not trying to understand the other person point of view and emotions
- Too focused on your own needs and the wanting to be the winner of the negotiation
- Perceives negotiation process as confrontational situation
- Trust levels might be low

The key to successfully achieve a negotiation is to carefully plan the negotiation strategy that it is intended to be followed. Perhaps, more important than planning a strategy, is to become aware of the motives and goals of the different party. Thus, when entering a negotiations you are well prepared to overcome obstacles, set new goals and objectives and find a line of communication with the other party/ies.

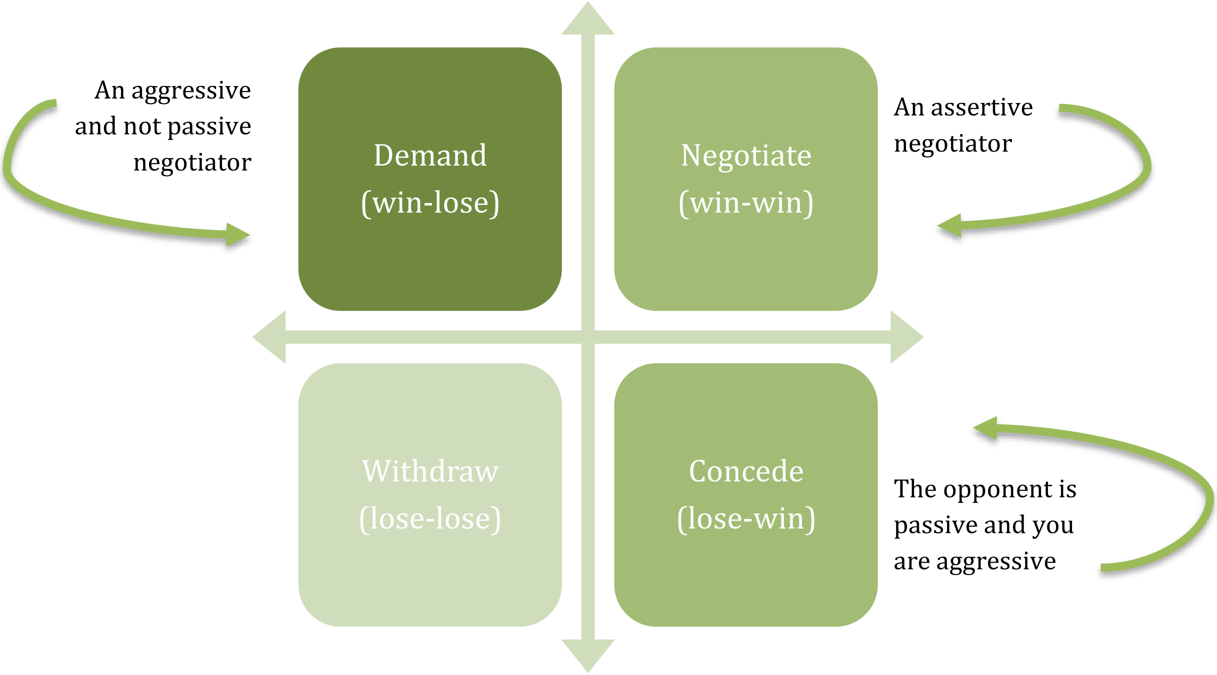
There are several different negotiation approaches to manage a conflict or to arrive to an agreement. Matching the strategy to the situation is the golden rule. Some approaches to negotiation strategies are the following:

- Problem solving – all involved parties are willing to examine alternatives and to discuss thoroughly in order to arrive to an agreement
- Contenting – in the case you have the most "wins" from the negotiations this is the strategy to persuade the other party/ies to accept the proposal and outcome of the negotiation
- Yielding – compromise your negotiation wants, especially those that are not so important for you to lose, yet, they are important to the other party. This approach is particularly effective in long and continuing negotiations.
- Compromising – all parties recede from their initial position and settle to a moderately satisfactory outcome to each of the involved parties.
- Inaction – recruit your tackling. In the case negotiation does not leave you happy with the way it proceeds, this strategy allows you more time to rethink and decide the next tactics.

The chosen approach is solely depended on who you are negotiating with and the type of relationship you have with them and want to keep with them once the negotiation is settled. This will affect the behaviour of each party during the negotiation. What is more, a successful negotiator should have certain qualities that will be the driving force to the negotiation taking place. Some of these qualities are professionalism, confident, relaxed, open, honest, sincere and credible, respectful to other peoples values and finally, committed to a win-win situation.

The result of a negotiation could be one of the following:

- Lose-Lose
- Lose-Win
- Win-Lose
- Win-Win

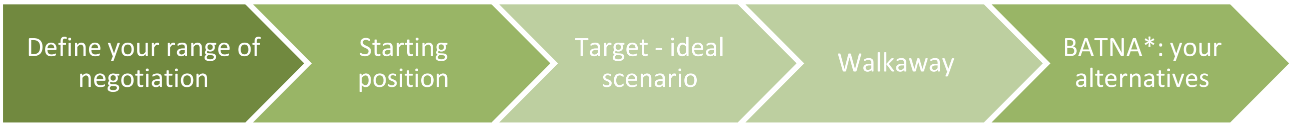


In general, in order for a negotiation to be successful, at the beginning there must be a briefing of the topic of negotiation while the objectives should be clear to all. In addition, all involved parties should be fully acquainted of what they are trying to achieve in terms of what they would:

- Like to achieve (most favoured, ideal settlement)
- Intend to Achieve (expected results, realistic settlement)
- Must Achieve (fall-back position, bottom line)

Then, a negotiator should have a plan of the tactics intended to apply, while taking into consideration the other parties' objectives as well.

The baseline to negotiation is depicted in the following diagram.



**Best Alternative to a Negotiated Agreement**

In order to start negotiating, first of all it is important to become a good listener. In addition, try to be as prepared as possible and gather information on what the other party aims to achieve, how they feel and what are their option. Once the negotiation begin be optimistic and aim high. Be patient with the process and allow enough time without being in a hurry. What is more important thought, is to know when to walk away. Take time to rethink your options and avoid negotiating without knowing your alternative.

A person might find himself to the position to use his negotiation skills for conflict management.

A conflict is the situation in which the behaviour of a person or a group deliberately seeks to prevent the attainment of the goals of another person or group. This behaviour leads to negative results. Although conflicts are part of our daily lives, people fail to realize that they often happen due to poor communication. Instead, when being clear of the emotions and objectives of a situation the conflict can be constrictive and have catalytic effect on new ideas, positive changes and growth (Swansburg 1999, Rahim 1986).

Fritchie (1995) distinguish conflict in "warm" and "cold". While warm conflict can contribute to the creativity and the activation of the individuals involved, the cold conflict creates obstacles to the communication as the existence of the conflict is not always perceived. Therefore, in order to properly manage the conflict, it is important to recognize the nature and type of conflict and how it can be properly managed and resolved.

Some causes of conflicts arise from intense competitiveness, different levels of education, small workplaces, high demands and a pressing need to achieve good results. All these greatly contributes to the emergence of conflicts and oppression of people. Similarly to negotiation, the results of conflict resolution are the same as the results of a negotiation:

- Competitive (win-lose)
- Accommodative (win-win
- Avoidance (lose-lose)
- Compromise (lose-lose)
- Collaboration (win-win) (Gill, 2014).

There are 5 steps that can help in managing conflicts:

1) Anticipate – take time to obtain information that can lead to conflict.
2) Prevent – Develop strategies before the conflict occurs.
3) Identify – If it is interpersonal or procedural, move to quickly manage it.
4) Manage – Remember that conflict is emotional.
5) Resolve – React, without blame, and you will learn through dialogue.

It is more likely to have a positive resolution of conflict when all involved parties will be mutually benefited. To achieve this it is important to cultivate a mind-set that there are many different perspectives to look at a situation. At the end of the day, conflict management seeks for the negotiation of a solution by which both sides may better understand the position of the other and have a mutually satisfactory solution. A professional management of conflict helps identifying legitimate differences, stimulates competition and motivates the workforce.

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whole school social labs

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