



Societal  
Security  
Network

VIRTUAL CENTRE OF EXCELLENCE FOR RESEARCH SUPPORT AND COORDINATION ON SOCIETAL SECURITY

## D2.2 WORKSHOP COORDINATION PLAN

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## D2.2 Workshop Coordination Plan

**Abstract:** Deliverable 2.2 outlines the role of the partners involved in the workshop coordination, the timeline of all workshops organised throughout the SOURCE project and the logistical and organisational memorandums for workshops. It is meant to serve as a guideline for all partners of the SOURCE project when organising a workshop.

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## Contents

Introduction.....	1
1. List of workshops organised in the SOURCE project .....	2
2. Role of the workshop coordinator partners.....	3
3. Methodology to be used when organising workshops .....	3
1. Invitation of participants .....	4
2. Interactions and dialogues during the workshop.....	4
3. After the workshop .....	5
4. Guidelines for the organisation of workshops .....	6
Annex I: Memorandum for SOURCE workshops .....	7
Annex 2 – Template of an invitation letter to a SOURCE workshop .....	11



## Introduction

Workshops are a central element of workpackage 2 and of the SOURCE project in general. The overall objective of workpackage 2 is to establish and support a network linking researchers, actors, agencies and institutions most concerned with societal security in Europe. The rationale of the SOURCE project is to organise workshops as the main infrastructure to facilitate knowledge-sharing across these sectors. An underlying challenge is that all actors are not necessarily concerned with societal security in a similar way. This is why all workshops organised throughout the SOURCE project need to have a common methodology and a streamlined organisational pattern.

CEPS has been designated as Workshop Coordinator based on its rich experience with conducting and facilitating high quality conference, workshops and seminars particularly on the European arena.<sup>1</sup> All partners involved in the task also have extensive experience in the organization of high-quality workshops. The primary responsibility of the partners involved in the workshop coordination will be to standardise programmes, streamline content and assist the partners by providing inputs and suggestions. However, each partner will have the main responsibility for organising their assigned workshop.

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<sup>1</sup> See SOURCE Annex 1 – Description of Work, part B, p. 31/76.



## 1. List of workshops organised in the SOURCE project

#	Year 1 - 2014	Partner	Location	Month	Deliverable
1	WP3 - Workshop1	IRKS	Vienna	4	3.1
2	WP2 - Sector Survey	IRKS	Brussels	5	2.3
3	WP3 - Workshop 2	PRIO	Oslo	Year 1	<i>open</i>
4	WP5 - Workshop 1	PRIO	Oslo	Year 1	<i>open</i>
5	WP4 - Workshop 1	KCL	London	Year 1	<i>open</i>
Year 2 - 2015					
6	WP2 - Assessment workshops 1	PRIO	Brussels	15	2.6
7	WP6 - Workshop 1	PRIO	Brussels	20	6.1
8	WP2 - Assessment workshops 2	PRIO	Brussels	24	2.6
Year 3 - 2016					
9	WP2 - Assessment workshops 3	PRIO	Brussels	30	2.6
10	WP4 - Workshop 2	FOI	Stockholm	Year 3	<i>open</i>
11	WP5 - Workshop 2	PRIO	Brussels	Year 3	<i>open</i>
Year 4 - 2017					
12	WP2 - Assessment workshops 4	PRIO	Brussels	42	2.6
Year 5 - 2018					
13	WP6 - Workshop 2	TNO	The Hague	55	6.4

The SOURCE project foresees the organisation of **13 workshops** throughout the five years duration of the project. Nonetheless, additional workshops might be considered and take place during the course of the project if they contribute to and are relevant for the purpose of networking and expertise-sharing.

The term “workshop” encompasses meetings and events of different nature. Some of these are assessment workshops organised during the second, third and fourth year by PRIO in order to gather network members from all areas of the network and outside. This workshop assessment exercise has its own methodology and will not be addressed in this deliverable. The table above also lists internal meetings where only a limited number of SOURCE partners participate (such as Workshop #1 listed above), to which the methodology presented in the next sections does not necessarily apply. This being said, partners are recommended to use the templates, checklist and recommendations presented in this report also when organising such events.

Other events of the SOURCE Project, such as the European Symposium and the Midterm conferences, do not fall into the “workshop” category. Partners organising these events are welcome to use resources of this deliverable as well, if they wish.

All other workshops should follow the methodology and approach outlined in Section 4 and 5 of this deliverable.



## 2. Role of the workshop coordinator partners

CEPS, PRIO, CIES, TNO and IRKS will be the main partners involved in the task of coordinating the workshops (T2.2). They will have the role of supervising and providing advice on the SOURCE workshops throughout the duration of the project, and will provide the partners with the relevant materials (templates for list of participants, programmes, posters, etc.). However, each partner is responsible for organising and conducting the workshops they have been assigned to. Indeed, it is important to note that the fact that CEPS has the lead on the workshop coordination does not imply that CEPS, nor the task partners, will organise all the project's workshops. Responsibility for workshops and meetings lies with the assigned partner.

This essentially means that the partner responsible for organising a workshop would need to take care of all the logistics (find a venue, draft the programme, contact the speakers and the participants) and ensure that the workshop is in line with the project objectives and that all the materials respect the templates provided.

The workshops being organised according to the list presented in the previous section will be monitored by the coordination team under the lead of CEPS. The latter will liaise with the coordinator, the Steering Committee and the partners organising the workshops, in order to make the objectives of the workshops consistent with the objectives of SOURCE. A review mechanism will be set up at regular intervals by the SOURCE Steering Committee to present the upcoming workshops and plan them in advance, and when possible, together. This calendar will be displayed and regularly updated on the intranet.

The workshop coordination team will also be available to answer questions and provide feedback to other partners on the organisation of workshops. To this end, this report includes a memorandum for organising workshops and a template for an invitation letter to participants of the workshops. A template for an agenda of the workshop, for a list of participants and guidelines with the logistics to organise workshops (catering, microphones, flashcards for chairs, nameplates, badges, etc.) will also be made available to all partners by email and saved on the SOURCE Intranet.

## 3. Methodology to be used when organising workshops

It is recommended that the organising partner distributes the preliminary agenda among the partners and coordinator in order to allow inputs from them as well as to inform the consortium on the dates, venues, etc. The workshop would need to be disseminated widely (in case it is a public event) not only by the organiser, but also by the consortium partners as well as posted on the project's website.

While each SOURCE partner is free to choose its own methodology when organising workshops in the framework of the SOURCE project, especially when a specific result needs to be achieved through a specific methodology (such as the DESSI method put forward by IRKS in the organisation of the Sector Survey Meeting T2.3),<sup>2</sup> it is important to respect the following minimum requirements for a successful workshop. The guidelines below therefore provide a step by step methodology to keep a clear, coherent and standard way forward when organising a SOURCE workshop.

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<sup>2</sup> See <http://securitydecisions.org/>



## 1. Invitation of participants

When organizing workshops related to workpackage 2, participants should, unless otherwise agreed, come from the 5 user groups mentioned in the description of SOURCE, namely social and human sciences researchers, technology developers, security policy makers, civil society and end-users. The number of representatives from each group should be balanced and proportional to the total number of participants. In some instances it may be important to have more participants who are not SOURCE partners than partners' representatives, otherwise the workshop might quickly transform into a de-facto SOURCE internal meeting.

Selecting the participants to invite to the workshop is a crucial task in order to have a successful event. It is important that the partner organising the workshop can rely heavily on its own contacts as well as on the contacts from other partners of the project who could suggest participants from their own specific contact lists.

It is important to send each invitation in a personal manner, addressing the invited participant by name. It has been experienced that when inviting participants to events/conferences, there is a much higher positive response rate when these are addressed personally. A template for an invitation letter can be found in Annex 1. This letter should preferably be signed by the organising partner and the project coordinator before being sent by email (in pdf format).

In order to convince potentially cautious invitees, the invitation should mention if the workshop is organised under the Chatham House rule. Under the Chatham House rule, participants and organisers are free to use the information received, but neither the identity nor the affiliation of the speaker(s), nor that of any other participant, may be revealed.<sup>3</sup>

Invitations should be sent at least one or two months in advance to prepare the workshop with enough time and allow those participants coming from far away to book their travels well in advance.

## 2. Interactions and dialogues during the workshop

The following paragraphs provide guidelines and suggestions on the methodological approach to be used when organising workshops. These are however not mandatory. It is indeed up to each partner to adopt a specific methodology depending on the objectives of each workshop.

Workshops may include 2 or 3 rounds of discussions with participants on specific topics, but can also be organised differently depending on the methodology used. To foster interactions and debates, the workshop room should ideally be set up in a "round-table format". The workshop should always start with an introduction by the organising partner, in order to welcome the participants, present the SOURCE project, acknowledge the funding and explain the rationale behind the workshop.

After the interventions from all the speakers in a panel, there should always be a possibility for an open debate with the audience. For this purpose it is important that all the panellists respect their timings and therefore allow an active Q/A session afterwards. Moreover, the panellists should also have some time allocated at the end of the panel to react and respond to the questions raised.

It is up to the organising partner to decide if the "Chatham House rule" will be used (see above). If so, it has to be clearly stated during the welcome session. Using the Chatham House rule might allow for more in-depth debates, especially on sensitive issues, and might reassure participants from public sectors or private companies that what they say will not be used against them in the future.

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<sup>3</sup> See <http://www.chathamhouse.org/about-us/chathamhouse-rule>



However, the report stemming out of the workshop, when made public, cannot include a list of participants and may only anonymise statements made during the workshop.

Having participants sign a “presence list” should be considered, as it could be of big help in case of administrative issues with the European Commission (such as reimbursement of flights if the participant has lost his/her boarding pass). This presence list could also serve as a “consent form”, by which participants agree that the workshop might be recorded, that everything they say can be used by the SOURCE project for research purposes only, and that their personal information may be processed in accordance with EU rules. If a participant is not willing to sign the consent form and the organiser fails to convince him/her, the recording of the workshop will need to be stopped and the requests of the participant as regards his/her personal data will need to be noted down and addressed after the meeting.

The following template of Informed Consent Form may be used during workshops of the SOURCE project:

#### Template of Informed Consent Form:

- I consent to the processing of my personal information for the purposes explained to me. I understand that such information will be handled in accordance with the terms of Data Protection Directive (Directive 95/46/EC) and its national implementations.
- I consent to the workshop being recorded.
- The information I have submitted will be published as a report and I will be sent a copy. I have been informed that confidentiality and anonymity will be maintained and it will not be possible to identify me from any publications.

Name and signature:

During the workshop, a SOURCE partner will need to take notes or record the workshop in order to be able to draft the proceedings report afterwards. The responsibility of providing the minutes of the meeting lies with the organizing partner. The report should include a brief paragraph with the main ideas raised by each of the panellists. The organising partner together with the coordinator would need to assess if the open discussions taking place at the end of the panels should also be included in the proceedings or not.

### 3. After the workshop

Following the workshop, a “thank-you e-mail” should be sent to all participants. They should also be informed on future events and publications that will take into account the findings stemming from the workshop they participated in. The thank-you e-mail should also include directions regarding the reimbursement of travel expenses and hotels (if applicable). It is important that all participants keep their boarding passes and proofs of payment and send them back to the workshop organiser, as this is an imperative requirement by the European Commission.



#### **4. Guidelines for the organisation of workshops**

The following templates will be made available on the intranet and on request to CEPS:

1. Template for the invitation letter (see Annex II)
2. Template for the Workshop Agenda and Programme
3. Template for the name badges
4. Template for the list of participants
5. Template for the PowerPoint Presentations and Poster

## Annex I: Memorandum for SOURCE workshops

Task	DONE
<b>Two months before the Workshop</b>	
Book a Conference Room for the Workshop	
Book a room for any additional meeting (if needed)	
Draft of the Programme	
Send the draft Programme to the Coordinator, CEPS and the consortium partners (if applicable) for comments and suggestions on the speakers	
Finalize the list of key panellists and participants to be invited	
Send invitation email to the Panellists (use the invitation template)	
Once they confirm - Send details about the steps to follow up for the Panellists (Minutes of their intervention, inform to send PowerPoints in advance, publications to disseminate, if they want to join a dinner, ask them to send their bios, etc.)	
Send a Reminder to those who have not answered or follow up by phone	
Hotel reservations (if any)	
Inform the partners on the event (SAVE THE DATE e-mail) attaching the preliminary Programme	
Publish the event on the SOURCE Website (it is also recommended to publish the event in all the partners' websites)	
Disseminate the event through a dissemination e-mail (to be sent to the contacts list or to those actors targeted for the event)	
Book a restaurant for the main working dinner (if any) (Inform the restaurant on the date and more or less the number of persons, and ask	

for a menu)	
Follow up the deadline for receiving the Power Point presentations, Bios and participation to the dinner (if any)	
<b>One week before</b>	
Follow up registrations and/or with those persons that we would like to be present	
Contact the speakers / panellists providing them with all the logistical details (timings, final version of the Programme, venue, transportation, telephone contact, etc)	
Follow up with the speakers regarding their interventions/contributions	
Print the nameplates with the SOURCE logo (First Name and FAMILY NAME of the panellists) (Use of the Template)	
Print some blank badges for the people who have not registered and would like to attend	
Arrange/Book the catering lunches and coffee breaks (provide the timings to the caterer)	
Inform the personnel in charge of the meeting room or of the organization about the room style and give them a Programme	
Confirm the booking of the hotel rooms (if any)	
Confirm the menu for the main dinner (if any)	
Draft the compilation of publications for the audience and start printing	
<b>Two days before</b>	
Confirm the number of participants to caterer	
Confirm the number of persons to the restaurant for the main dinner (if any)	



Prepare the expenses claim forms (depending on the Institution) for those panellists that will need to get reimbursed for their travel expenses (provide original invoices, tickets, boarding passes and Bank details)	
Print the final Programme in colour	
Prepare and print the List of Participants (First Name and FAMILY NAME, Position and Institution) (Use of the Template) * all the attendees need to sign in order to confirm their assistance as required	
Prepare and print badges for all participants registered (First Name and FAMILY NAME and Institution) (Use of the Template)	
Items to be advertised (Brochure/Leaflet of the project, Official documents, project publications, Books (COPY FOR DISPLAY), etc) * Print document where those persons interested on receiving information on the project could register (It is recommended that they provide: Name, Surname, affiliation, Institution and e-mail address).	
Prepare and print poster for the front door (The cover page of the Programme can be used for this purpose)	
Prepare PowerPoint poster with the Title, date and place (Use the Template)	
Prepare flashcards for the persons who will Chair the panels (short Biographies of the panellists, indications on the timings, order of intervention, etc)	
Confirm that all the technical equipment is ready	
<b>The day before the event</b>	
<ol style="list-style-type: none"> <li>1. Print the badges (in colour)</li> <li>2. Print the list of the participants (in colour) Give one List to the person responsible in the welcome/registration table</li> <li>3. Conference room: Arrange the room in conference/theatre's style or roundtable Install all PowerPoints on the laptop (if any)</li> </ol>	

Prepare the telephone for Taxis (in case some of the panellists would need one)	
Print map with the name and the direction of the restaurant (if needed)	
Have a Coordination meeting with the team (tasks sharing): <ol style="list-style-type: none"> <li>1. welcoming</li> <li>2. PowerPoints</li> <li>3. minutes</li> <li>4. microphone during the Q&amp;A</li> <li>5. water and glasses for the speakers</li> </ol>	
<b>Before the event starts (1-2h in advance)</b>	
Put the badges in alphabetic order (if necessary)	
Put the Programme at the entrance and the posters	
Check meeting room: Batteries of the wireless keyboard (if any) Batteries of the wireless microphone (if any) Microphones of the table/panel working Everything is clean Projector is working Put the nameplate of the first speakers, and chairs (the Chair person should be in the middle)	
<b>After the workshop</b>	
Send emails to the panellists thanking them for their participation and reminding them to send all the originals regarding their travel expenses	
Elaborate the proceedings of the meeting	
Send the proceedings to the panellists in order to receive their green light (include a deadline for the reactions)	
Inform the partners if there is any element (related to research purposes) that needs to be followed up for the sake of the project	
Save the Programme, list of participants, and excel list with all the participants including their e-mail addresses (this list is to be kept on the Intranet as confidential and just for the partners). Check with the coordinators if anybody needs to be included in the project's contacts list for further collaborations or informed on the project	



## Annex 2 – Template of an invitation letter to a SOURCE workshop

**Subject: Invitation to the SOURCE Workshop on [Title] - [Date], [Location]**

Dear [Name],

On behalf of the SOURCE Project, we would like to kindly invite you to participate as [Role] in the Workshop on [Title], organised by [Partner]. The event will take place on [Date] in [Location and timing] and is organised within the framework of the SOURCE project (*Virtual Centre of Excellence for Research Support and Coordination on Societal Security*) funded by the European Union's Seventh Framework Programme. You may find enclosed to this invitation a preliminary agenda of the Workshop.

The workshop will focus on issues surrounding security in our societies and, to this end, will gather experts from different levels of the security chain, namely social and human science researchers, technology developers, security policy makers, civil society and end-users. This event will be [open to the public or by invitation only] and will provide a unique platform for discussion, in a small group, allowing an intensive debate among the participants.

Based on your position and expertise on the matter, we would be delighted if you would agree to participate as a [Role] in the Panel “[Name of the Panel]”. We would ask you to participate in the discussions and provide your views on the [Provide a title or indicate the main questions/issues to be raised].

Please note that all costs associated with your participation in this event will be covered by the SOURCE project. Should you require any further information on this event, please do not hesitate to contact [Name and e-mail address] or by phone at: [phone number]. We would be very happy if you could please **confirm your participation** to the workshop **before [Deadline: Day and time]**.

The aim of the SOURCE Network of Excellence is to create a robust and sustainable virtual centre of excellence capable of exploring and advancing societal issues in security research and development. The SOURCE Network of Excellence meets the goals of raising the awareness among policy makers and end-users, raising the competitiveness of the security industry by better applying it to the social layers of insecurity in society and, as a consequence, contributes to the improvement of the well-being and security of European citizens. More information on the SOURCE project can be found on its website: <http://societalsecurity.net/>

We very much hope that you will agree to participate and look forward to hearing from you.

Yours sincerely,

[Name]

[Signature]