

Developing an Operations Plan to Operate a School of Internet Governance

This document is the product of a cooperative effort by a group of organizers, faculty, and fellows from several Internet governance schools from around the world. It is by nature an incomplete description as the field is growing and new approaches and courses are added all the time. This document will remain a living document of the IGF Dynamic Coalition on Schools of Internet Governance. (DC-SIG) and will be updated yearly based on the contributions of DC SIG participants and others.

As work was preceding on the [DC SIG Toolkit](#), members of the DC SIG decided that we needed to work on a guide that got into many of the details involved in producing a school. While there is no belief that all schools were the same, or that the task of creating a school would be the same in all cases, the DC SIG decided to gather the experiences of the many schools participating in the DC into a document that we hoped would help people plan. Work on this document is only a few months old, and the document is still essentially an annotated outline for the document we intend to produce. We decided, however, that this was a good time to put it out and elicit comments, and perhaps more importantly, contributions.

Readers will notice that there are many opportunities to add content. This is a work in progress as well as a living document. The content is a reflection of the interests and knowledge of those who volunteered to contribute text. The DC met 6 times over the last year to review and approve the new and edited text. Going forward, any reader who has been involved with a SIG who has knowledge in an item being discussed is invited to comment and to suggest edits or new content. The URL for the document can be found at the bottom of each page.

As the project goes on, information on various existing schools is being collected at <https://www.igschools.net/sig/sig/>. Readers involved in SIGs are invited to add their information to the map and to work with the DC on adding new information to the wiki and to the documents.

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Overview

This is an dynamic¹document that will evolve and expand over time with the aim to help new, and existing. Schools of Internet Governance with developing their own formalized processes and procedures to help them operate successful programs. This is document is still largely an annotated outline that will be worked on over the next year. Any reader who has the knowledge to develop any of the sections is invited to join the DC SIG in the bottom effort to collect and document the information necessary for an operational plan. The document, open for comments, edit and suggested text, can be found at the URL listed in the footer of each page.

Operations Plan

An operation plan is a detail-oriented document that clearly defines how a team contributes to reaching the school's goals. It outlines the daily, weekly, and monthly tasks required for setting up and operating a successful school. An operating plan defines everyone's role and accountability so that each volunteer or contractor knows their specific obligations, as well as how they should execute them within a defined timeline.

The plan should answer these crucial questions:

- What are the strategies and tasks that need to be completed or achieved?
- Who are the individuals responsible for those tasks and strategies?

¹ From Wikipedia: A living document, also known as an evergreen document or dynamic document, is a document that is continually edited and updated.

- When must each strategy be completed?
- How much will it cost?
- What are the risks?

In short, the Operations plan that ensures the execution of the day-to-day operations in a way that ensures reaching the long-term school goals.

Operational Topics

Logistics

Logistics is defined as referring to the process of coordinating and moving resources – people, materials, inventory, and equipment – from one location to storage at the desired destination. The term logistics originated in the military, referring to the movement of equipment and supplies to troops in the field.

Selection of Training Location

Every school will need to rent or receive, as in-kind contribution suitable space to deliver a programme based upon the number of students, type of education. This requirement may vary, especially in the case of online schools.

Types of Training Facility

This will vary from school to school. Some schools require one large room versus a number of small break out rooms. In some cases, the equipment may not be included in the leases, do not assume anything. Make sure it's clearly spelled out in the lease agreement. Remember to check:

- Location of the facility for student transit from hotels
- Handicap access for disabled students
- Quality of the room, clean and in good condition
- Housekeeping provision for classroom daily clean up
- Adequate power for student laptops or mobile devices
- Adequate network connectivity in classrooms and other areas
- Desks and chairs layout
- Lighting
- AV equipment
- Sound equipment

Audiovisual capacity

The provision of adequate projection equipment and screens will directly impact the participant experience. Need to verify if included in the Lease agreement.

Catering

The organization of food for breaks and lunches requires careful scrutiny as to the contract terms of the Lease with the facility. Many locations do not allow outside catering companies to provide food on site. Another issue is being aware of religious and dietary restrictions for students and staff so no food allergies are triggered.

Internet Capability

In this day and age, the availability of Internet access is essential for a SIG. Not only do the participants need access to do ongoing reading and research for school projects, but remote capabilities need to be considered.

Wifi capacity/Bandwidth

A verification of the capacity for WIFI to accommodate the number of students/teachers is required and a requirement of the Technology volunteer to test capacity in advance of the course delivery.

Broadcasting /Livestream/ZOOM capacity

If you are going to broadcast all the sessions you need to determine the cost for the extra bandwidth and arrange for use of the various services. This should be an assignment for your technology volunteer. See job descriptions.

Contracts/Leases

We strongly recommend that you read all the provisions in your contracts and leases with facility rentals, transport, hotel bookings, catering, IT support, liability insurance, etc. so you don't have any unexpected expenses or issues.

Suggestion to have two people review and sign the documents, in most cases deposits are required and they can expect the signatory providing their credit cards to hold a booking.

Storage and security

The pre-event logistics could include the delivery of speaker gifts, swag, participant bags, prizes, equipment, etc which requires a secure space. In addition, the security of the teaching rooms during breaks, lunches, and overnight needs a proper security plan.

Also, it's important that the organizers know the Safety Drills in case of fire or other mishaps to assure safe removal of everyone from the facility.

Equipment rentals

The list of potential rental can include:

- Router
- Wifi Extender
- Extension cords
- AV equipment
- Podium
- Speaker tub chairs or other types of chairs
- Table cloths
- Large screen TV
- Laptop
- Special AV adapters/connectors

Website and Hosting

We recommend that a domain name be obtained one year in advance of the delivery of the course. An assigned budget should be done for the design and hosting package. The selection of the hosting package and website should be the responsibility of the Webmaster who needs information for the website. See Job descriptions-Webmaster. The creation of a Facebook page, Twitter account, and dedicated email addresses should also be done.

Accommodation

The booking of local hotel rooms or campus dorm rooms requires a lot of pre-planning to obtain the best rates. Many times it requires prepayment so the organizer needs to understand the personal risks

Social events

Additional activities outside the formal training could include social events organized for fun and companionship/networking.

Security deposits and payment

This is a very important issue for new or struggling schools which lack adequate funds to underwrite a programme.

This can put an organizer at a huge financial risk if sponsorship or school fees are not collected.

Airfare

The organization and payments of airfare can be a very expensive option. Whenever possible try to obtain speakers who can obtain their own company travel provisions. If not you can offer a budget or economy flight which they organize themselves with a cap on the amount. Suggest you provide a suitable form for approvals to the sponsored traveler.

Local transportation

The local travel from hotels to the school can be arranged in different ways. Ideally, you should strive to have local hotels within walking distance, Special provision should be made to protect all students from potential harassment or injury. In the case of any disabled members, provisions for transport should be arranged.

If the hotel is far from the venue then measures to book a private bus service be made and provided for transport pick up and return times be made.

If the event is done at a University venue some arrangements might be procured with their internal transportation services.

Medical and Emergencies

An designated volunteer should take care of providing everyone with the provisions for emergency care. A first aid kit should be onsite and an emergency phone number for medical or other care be provided. It is suggested that in the participant handbook provided to each student that the emergency details be included.

Budget and Sponsorship

The success of any School of Internet Governance starts with a budget and clear business plan to raise sufficient sponsorship to run a successful school. A combination of In-Kind and Cash donations is a realistic goal. The budget will vary from location to location and the type of local partnership willing and able to contribute.

Budget

Its recommended to formulate a series of low, medium and high-cost budget projections which incorporate In-Kind and Cash donations.

In-Kind donations

The range of in-kind is potentially limitless but these are real items that could be In-Kind contributions

- Classroom
- Equipment rentals
- Website design

Cash or In-Kind Expenses

List of items

- Project Management fees
- Banking and accounting fees
 - Classroom rentals
 - Study materials and swag
 - Website hosting
 - Connectivity
 - Furniture rentals
 - Graphic design
 - Airfare
 - Equipment rentals
 - Meals
 - Signage, banners, and promotional pieces
 - Printing
 - Liability insurance
 - Local transportation
 - Offsite party
 - Video and Photography

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File at:

<https://docs.google.com/document/d/1oV7Nv5-_oQd9qx-5PIIziZ2oQUgyJR6UMKA0Lr58NZ8/edit?usp=sharing>

- Speaker gifts
- Lodging
- Misc expenses

Step One: Outreach to Sponsors

- Creation of the sponsorship program

Set goal for sponsorship

- Assign the task to the fundraiser
- Shortlist of sponsorship contacts and outreach
- Request letters to sponsors
- Follow up and more follow up

Step Two: Verification of Funding

- Sign a sponsorship agreement with sponsors
- Public announcement on collateral material and website of sponsors
- Establish a bank account
- Invoice to sponsors

Step Three: Followup

- Reports to funders/sponsor

Communication Plan

- Website site/Facebook Group/Twitter, other social media
- Press releases
- Media interviews
- Acceptance letters to students
- Letters for Visa Offices
- Letters of an offer to speakers and moderators

Meetings

- Regular planning team meetings
- Orientation sessions for students
- Post Event debriefing

Other Items

- Session Collaborative Notes
- Presentations/Slideshows
- Tweetstorm
- Photography, Livestream, and Video recording
 - Video and Photography Declaration
 - Waiver for students and speakers
 - Policy of recording
 - Distribution strategy
- Onsite Signage
 - Sponsorship banners
 - Event banners
 - Direction signage
- Student Kits
 - Detailed course description with readings
 - T-Shirts
 - Backpacks
 - Donations for backpacks
 - Participant Id tag

Human Resources

Creation of a Core Team

Recruitment of Core Team

- Project Manager
 - IT Manager
 - Logistics Manager
- Director for Programme
 - Assistant for Programme
- Director for Sponsorship
 - Administrative assistant

Job Descriptions

- Role and responsibilities
- Performance reports
- Replacement

Meetings and Reporting

- Routine reporting on performance and challenges
- Post-event report- Fail reports

School Programme

- Creation of Academic Committee
- Determination of Annual Yearly programme theme
- Presentation and Course materials
 - Criteria and deadlines for presentations
 - Distribution of slideshows
- Programme topic creation
 - Create and distribute a survey for topic suggestions
 - Voting process on topic selection
 - Matching speakers/facilitators to Topics
- Seminar/Workshop student feedback

Recruitment of Fellows & Admission Process

- Creation of Fellow selection committee
- Establish fellow selection criteria
- Design of Fellowship Application Form
- Assess all applications
- Selection and inform all applications
- Create a waiting list of applications
- Assess budget for types of full, partial, or minor fellowships

Evaluation and Reporting

Evaluation

- Assessment of program deliverables, shortfalls, and recommendations

Reports

- Public summary reports
- Private Summary sponsor reports
- Daily session/workshop surveys
- Comprehensive Full Programme Survey

SIG Alumni Communication

Each school can implement ways and means to keep in touch with the Alumni. This can include

- Alumni subscription lists ie. Google Groups
- Profile stories in the school blog
- Integration of Alumni in future schools ie. volunteer on selection committees, speakers, etc

Online Schools

The move to cancel a F2F for a host of reasons into a virtual school requires many of the similar planning features of a face to face, starting with setting a deadline when the decision to make it virtual. If the school relied upon guest speakers that require hotels and airfare the decision needs to be early enough. Important in the planning to make sure that the hotel and airfare permits for full cancellation (not a voucher).

In this chart, we indicate the differences.

	Face to Face	Virtual
Organizing team	Full planning	Modified team

Meetings	same	same
Budget	Full	Much lower An extra cost is Captioning
Program	Same	Same except cancellation of social events
Logistics	Extensive with travel, hotels, travel, food, gifts	Marginal-Planning on panels and speakers, Zoom room, etc Frequent reminders through emails to registered participants
Promotion	Emphasis on early promotion	More promotion for remote participants
Reporting	Same	Same

Conclusion

The goal of this Operations Plan is to provide some food for thought to anyone organizing a School of Internet Governance. It's not definitive since different locations may have different opportunities and constraints and many things could crop up that will affect operating a SIG. We wish you well.