ORGANIZING WORKSHOPS AND PREPARING SUBSEQUENT PROCEEDINGS

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Version 1.0. September 2005
Suggested reference

Online dissemination
This document is available online at www.projectseahorse.org (click on Technical Reports link).

Note on revision
This document was revised and reprinted/reposted in March 2005. Previous copies of the report should be destroyed as this revision replaces the earlier version.

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Published by Project Seahorse, Fisheries Centre, University of British Columbia

Series Editor – Keith Martin-Smith
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PART I. ORGANIZING A WORKSHOP

1. Groundwork

1.1. Organizational Staff

Below are various roles and responsibilities related to the organization of a workshop:

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workshop Organizers/ Leaders</td>
<td>Conceptualization, Obtaining funding, Design of workshop sessions, Overall project management &amp; supervision</td>
</tr>
<tr>
<td>Workshop Co-ordinator with essential support (see below)</td>
<td>Identifying &amp; Inviting participants, Corresponding w/ participants &amp; preparing briefing materials, Arranging travel &amp; visas, Selecting &amp; preparing conference facilities, Organizing accommodation &amp; meals, Preparing workshop materials, Hiring workshop staff, Supervising secretariat and staff, Managing budget and all finances, Writing final financial and technical reports for granting agency</td>
</tr>
<tr>
<td>Outputs co-ordinator</td>
<td>Overseeing production of proceedings and other outputs from meeting, Supervising rapporteurs and interpreters, Supporting participants in their preparations for the meeting</td>
</tr>
</tbody>
</table>

NB. The guidelines below and throughout this section are addressed to workshop co-ordinators; outputs co-ordinators can see Part II. for advice.

Pre-Workshop Preparations

The workshop co-ordinator should not work alone. **Don’t underestimate** the time and effort it will take to organize your workshop. The more reliable people you can find to help you with the workshop logistics, the easier your task will be. Possible options for decreasing the burden on the workshop co-ordinator are:
• Setting up a workshop co-ordination committee. If the staff is available, this is the best approach to organizing large meetings. Each committee member is responsible for a designated aspect of the meeting (e.g. Travel Arrangements, Hotel and Conference Room Hire, Catering, etc.). As co-ordinator, you will oversee the committee, holding regular meetings to make sure the planning is on track, and reserving the most sensitive issues for yourself to work on (e.g. selecting participants, managing finances).

• Hiring a part-time assistant, or several volunteers. This will be especially important in the 1-2 months before the workshop, as preparations become more intense.

On-site Preparations (up to 2 weeks before the meeting)

You will want to have a support staff with you in the one to two weeks before the workshop, and most definitely during the meeting itself. The size of the support staff, or *workshop secretariat*, will depend on the scale of your meeting. In all cases, you should designate an ‘understudy’: an assistant that is fully involved in the final preparations for the meeting, and would be able to take over and make decisions if you were unavailable. With a good principal assistant, you will be able to be at two places at once, getting twice as much done. In addition to the principal assistant, consider hiring secretariat members to:

• oversee audio-visual equipment and recording of the sessions
• make arrangements for sessions at outside venues (transportation, catering...)
• assist in organizing trips to field sites
• meet participants’ requests for information or materials
• run emergency errands (e.g. to the bank or stationery store).

The outputs co-ordinator should be on hand for the meeting, and may be able to help with the secretariat’s work in addition to their other duties (see Part II).

1.2. Budgets

Below are some of the items you might need to budget for in preparing a workshop. Items marked with a star are particularly relevant to conferences held in foreign countries:
1. Accommodation / Food  
- Hotel rooms
- Meals at hotel
- Coffee/ Snacks during workshop sessions
- Bottled water*
- Welcome and/or closing banquet
- Entertainment (e.g. cultural performances*)

2. Conference Facilities  
- Conference Rooms:  
  - Room hire
  - Audio-visual equipment
  - Photographer fee
  - Additional cleaning/decorating fees
- Outside Venues:  
  - Rental of venues
  - Transport to venues
  - Entrance fees and tour guide costs
  - Catering of meals at venues
- Materials & Supplies:  
  - Stationery
  - Banners & posters
  - Participant awards
- Workshop Secretariat and Staff:  
  - Secretariat members’ salaries and benefits
  - Interpreters’ fees
  - Facilitator’s fee
  - Rapporteurs’ fees

3. Travel  
- Ground transport
- Air travel
- In transit accommodation and meals
- Visa fees
- Travel insurance (workshop secretariat only)

4. Workshop Organization  
- Workshop co-ordinator salary and benefits
- Reconnaissance trip expenses for workshop co-ordinator*
- Bank Fees, Traveler’s Cheque service charges*
- Long-distance telephone/ fax charges
- Photocopying
- Postage and Courier
- Translation of documents

5. Workshop Proceedings (see Part II)

6. Overheads
1.3. Financial Management

It is essential that you be on top of all of the workshop expenditures. Set up a system right from the start for keeping track of expenses and monitoring how your budget is doing. Some tips that might help with this:

- Keep a notebook where you write down absolutely every penny that goes in or out of workshop funds. This will be especially important in the weeks before and of the workshop, as you and members of your secretariat will be rushing around buying last-minute items that are needed. Never give cash to anyone without first recording in your notebook that you have done so--it is very easy to forget that you’ve given small sums out to different people during a hectic day. Anyone who gets cash from you should also sign a receipt for you to keep, as a second record of cash outlays.
- Set up a good system for keeping track of receipts. At the end of each day, you might want to enter all receipts in a ledger or on a computer spreadsheet, and file the receipts according to category. If the receipt is at all unclear, write a note on the back of it of what the receipt was for.
- If you are reimbursing participants’ travel fees, you will need to convert from their currency to the workshop currency. Ask them for some proof of the exchange rates they are using, or check with a bank.
- Take the time to regularly check your actual expenses against your budgeted expenses, to catch any potential overexpenditure early on. Your funding agency might allow some flexibility between budget categories (e.g. overspending 10% in one, and underspending 10% in another) but you should verify this with the agency before it happens.

If you are working through a particular accounting system to finance your workshop, take a lesson early on from someone familiar with the system to learn their procedures. You should know how to read a ledger, how to submit cash advance requests and acceptable expense reports, how to send wire transfers, and how to make sure that the expenses you are charging to the account are being slotted into the right budget categories. This will make your task much easier at the end of the project, when you are trying to calculate the amount spent in each budget category. Also, do not underestimate the importance of making friends with your account administrator! Be firm when you feel you need to, but also be reasonable. You can’t expect the accounting department to bend the rules for you, so know the rules.

1.4. Timing

The time and effort involved in organizing a workshop will depend on the scale of the meeting. In trying to anticipate how much time the workshop preparations will take, remember that everything that can go wrong probably will, and that little things that shouldn’t take very long to do, will take long. Your experience with organizing meetings, as well as whether you are working with a small or large support staff, will affect your preparation time. Another important consideration will be sending out invitations early enough that you get the participants you want at your workshop. Academics, for example,
receive many invitations to attend conferences, sometimes up to a year in advance, so you may need to contact them early on. As a **general guideline**, organizers should plan for a minimum of eight months of preparation from the time of grant notification to the workshop itself. This will allow adequate time for arranging logistics, including identifying participants (where language and telecommunications may pose obstacles), obtaining visas and briefing them on workshop subject areas and objectives.

2. Workshop Participants

2.1. Selecting Participants

If you know what **types of participants** you would like to invite, but do not know exactly who—

- Start with a list of the types and number of people you would like to have attend, keeping in mind the objectives of the workshop (e.g. a target number of topics or fields that must be represented, and a minimum number of people from each field you want to invite).
- Go through your contact lists and those of your colleagues, and choose key people to write to for their help in identifying participants. For example you could write to:
  - contacts within the country of interest, and likely to know of potential participants (e.g. university professors, conservation workers)
  - people working in fields you would like to have represented at the workshop
  - international and national NGOs e.g. TRAFFIC regional offices
    WWF regional offices
    Fauna & Flora International
- You can also post requests for help in identifying participants to relevant e-mail discussion lists and web sites, but you must be a bit vague. Don’t specifically mention that you are holding a workshop unless you want to explain to many, many people why you can’t invite them.

E-mail is a very effective way to **communicate** with contacts and potential participants. You can e-mail your leads once a week or so until you get a response (but use your judgment and avoid harassing people). If time is running out, sending a fax often produces near-immediate results, and is always worth trying. If you really can’t get a response from someone, a phone call is the best option.

Remember, especially if you are dealing with NGOs, that most people are very busy, and that helping you find participants for your workshop may not be an obvious part of their mandate, even if it is a conservation-minded meeting. These contacts are doing you a favour, and you must be **patient, but persistent**. Always write back to thank everyone who helps you, every time that they do. Ask them if you can do them any favours in
return, and offer to keep them updated on the outcome of the workshop, if they are interested.

Don’t forget to invite someone from the granting agency to come!

2.2. Correspondence and Briefing Materials

Until you meet at the workshop, your only contact with most participants will be through correspondence. You should follow an official mailing schedule of informative letters and briefing materials, while maintaining an informal correspondence with any participant who happens to write to you with additional requests for information. Your mailing schedule could include:

A. Invitation Package

**min. 6 months** before start of workshop

- Once you have identified people to invite to your workshop, send them:
  - an invitation letter, signed by the workshop organizers;
  - a confirmation sheet they can return to indicate whether they accept/decline your invitation. On this sheet you can also ask for: complete contact information, roommate preferences, dietary requirements, and whether they need financial aid to attend the meeting (if aid is being provided);
  - an outline of the workshop, explaining the objectives of the meeting and its main themes, introducing the organizers and funding agency, explaining the preparation required of participants for the meeting, and the workshop’s expected outputs;
  - a rough agenda, noting that this will be subject to change.
- As soon as you receive the returned confirmation sheet, write to the participant to double-check the information provided.

B. Briefing Materials

**2-3 months** before start of workshop

- Send workshop briefing documents to participants
  Briefing materials serve to improve understanding of workshop themes, and are especially useful if you are inviting a diverse range of people to the meeting, who may not be aware of all the issues likely to come up in discussion. The effort you put into preparing relevant and interesting briefing materials will encourage participants to take the meeting, and their preparation for it, very seriously. These documents will most likely be short discussion papers outlining the latest research or current thinking on issues relevant to the workshop. You could ask for participants to comment on these documents, and explain that the documents will be revised accordingly. The commenting process serves to get participants engaged in the workshop preparation, and also brings valuable new ideas to organizers on the workshop topics.
- Thank participants for comments as soon as these are received.
C. Preparation Information & Invitations to Speakers

**min. 2 months** before start of workshop and **sooner** if substantial preparation is required (for example, if speakers will be presenting original research results)

- Send participants more detailed information on the nature and location of the meeting, and what preparations are expected of them for the workshop discussions. Documents could include:
  - a letter explaining what is expected of them in terms of preparation (e.g. come to the meeting prepared to discuss topics A, B, C; ask your colleagues for their views so you can represent them at the workshop, etc.).
  - a short travel briefing on the workshop’s host country and city, explaining weather, appropriate clothing, language used, etc.
- Once the workshop organizers have decided on workshop speakers, send selected participants a formal invitation to present at the workshop, together with instructions on the general theme to be addressed, the length of the talk, and the audio-visual aids that will be available. Make sure you receive their confirmation that they will speak, and the official title of their proposed talk. If proceedings will be prepared from the workshop, the outputs co-ordinator could be responsible for correspondence related to presentations.
- For those participants that have not been asked to speak, explain (tactfully) why there has been a selection process, and invite them to bring posters or any materials they might want to distribute. Provide guidelines for posters if you would like consistency. Speakers should also be asked to bring posters and materials.

*NB.* You should remind people of the video format used in the host country so that they can bring properly formatted videos to show at the workshop.

D. Briefing Materials- Comments Returned

**1-2 months** before start of workshop

- Write a chase letter to any participants that have not returned their comments on the briefing documents. Continue to chase until comments are received.

E. Reminder

**1 month** before start of workshop

- Send a reminder to participants to:
  - purchase plane ticket and send co-ordinator complete travel information (flight numbers & schedule).
  - have their visa and passport sorted out.
  - send their comments on the briefing documents, if they still have not done so.

F. Final Thoughts

**2-3 weeks** before start of workshop

- Get participants geared up for the workshop by sending them:
– a revised agenda (subject to change) and participants’ list;
– a request for any materials you will need them to bring to the workshop (e.g. photographs, CVs, material you want to incorporate into the proceedings);
– a reminder of the format for talks and posters;
– the revised briefing documents, incorporating participants’ comments.

if there are few substantial changes to be made, you can send a list of the comments made, without revising the entire document.

Hints:

• Set up an e-mail address list that includes all the workshop participants, so you can mass-mail important messages.
• Set up a mailing spreadsheet, so that you can see at a glance which participants are missing mailings. It’s easy to get confused in the mailing process as new participants get added to the invitation list.
• Always send documents from official mailings (or anything you consider important) by e-mail and by mail to participants. Expect problems with the mail service in developing areas of the world - in those cases, also fax the documents if they are not too long.
• If you send CDs in the mail, indicate this on the envelope. Make sure to attach a Customs form indicating that the material in the envelope is of no commercial value.
• Important! Some of the workshop participants may not be able to read English very well. If you have the budget to do so, translate as much of the correspondence as you can; if money is limited, you should still at the very least try to send the cover letter and workshop outline in the participant’s native language. You can suggest to these participants that they find someone who can help them read the English documents.

2.3. Travel, Visa and Insurance Arrangements

This section deals with the travel and visa arrangements of participants coming from other countries to attend your workshop.

Some participants will need more assistance with their travel arrangements than others. If participants are paying the travel costs to the conference themselves, you do not have to get involved in their travel arrangements, besides providing such basic information as which airport they should fly into and how to get to the hotel, expected airport taxes, and any recommendations as to the relative safety of different national airlines. Recommend that they deal with a travel agent familiar with the region, and try to stay as uninvolved as possible.

Do not offer to re-arrange travel plans or change plane tickets for participants at the workshop unless you really have the time and staff to do this properly. If you mention that you can help change tickets around, suddenly everyone will want to be flying home with their new best friend from the workshop, and it will be chaos. The hassle and huge potential to make a mistake in re-booking is really not worth the stress and people-time.
If the workshop is providing financial aid to participants, by paying for their travel costs, you will have to arrange payment for their air travel and other costs associated with getting to and from the workshop.

- Decide what level of financial aid you can offer to each participant, and lay out clear guidelines as to what expenses are covered by the travel fund. Acceptable costs might include air and ground transport, meals and accommodation in-transit, visas, and airport departure fees. You may not want to pay for such costs as obtaining a passport, or any health insurance costs.

- Make it clear from the start that the workshop will not be able to increase the financial aid if it turns out that participants spent more than their allocated amount to come to the meeting. This will give people a chance to tell you from the outset if the amount budgeted for their travel is too low. You should keep in mind, however, that in some countries/ cultures money is a very delicate topic, and people will not necessarily volunteer the information that the financial aid offered is insufficient, and may give another excuse for why they cannot attend the meeting. If you can increase funding in these cases, you might want to do so.

- Some participants will be able to pay for their travel costs up front, and wait to be reimbursed at the workshop. Others may not have the funds available to cover any costs, and you will have to arrange to send them a wire transfer. Your accounting department may want proof that this person is registered to attend your workshop. If the wire transfer is to cover a plane ticket, you may prefer to send the transfer directly to the participant’s travel agency, after having received an invoice. Remember that it is usually less expensive for participants to buy plane tickets within their own country than it is for you to buy their tickets for them from abroad.

All participants that receive a travel advance need to account for how they have spent those funds, and return any unspent money. You need to be certain of collecting all necessary receipts from the participants that received financial aid, and unfortunately the process can get quite messy.

- Currency exchanges will make it difficult to keep track of exactly how much each receipt is worth, and how much is owed by or to the participant. Insist that they submit exchange records with their receipts to try to make this easier.

- If you are reimbursing participants’ expenses at the workshop, they still need to get home and will incur expenses on the trip back, for which they have no receipts as yet. There are two options:

  A. You estimate how much money they will still need (in consultation with the participant, and respecting the maximum financial aid they’ve been allocated), give them or let them keep those funds, and ask them to submit receipts on their return home.

  B. You delay paying back any participants until the workshop is over and everyone has returned home. Participants then return their complete expense report sheets, and you arrange to send wire transfers or cheques to those owed money, and ask them to send payment for any amount owing.
Overall, option A is safer and simpler, as you have direct contact with participants and can settle transactions without relying on banks. The disadvantage is that you may have trouble getting back the receipts you need.

To help yourself keep on top of travel advance accounting (following the Option A strategy), you should:

- Remind participants repeatedly before and during the workshop to keep all receipts, together with a record of currency transactions (with receipts) that clearly shows any money lost or gained in exchanges. It is especially important that they keep the original air ticket receipt if we have paid for their airline travel. The receipt is the last page of the ticket booklet, and participants will have to mail it to you once they have returned home and no longer need the ticket.
- On the first day of the meeting hand out expense forms for them to fill out and submit with relevant receipts. You will want to have them submit the report to you at least one full day before the workshop ends, so that you can check that everything balances. You may want to arrange with the hotel that no one is allowed to check out until you have approved their expense submission.
- There are bound to be expenses submitted that weren’t approved in the initial financial aid guidelines. Use your judgment as to how much of a problem this is. More problematic is participants’ running up room service charges, and having it charged to the workshop. Make clear to participants that room service is on their own account, and make sure the hotel staff knows this as well, and keeps billing separate.
- Take the time you need to balance the participants’ reports, and don’t do it with them in room. Distribute and collect payments from participants at a pre-arranged time (e.g. People with last names’ beginning with A-J can come to the secretariat at 10am, the next group at 10:30, etc.).
- After checking the expense sheet over, collect any unspent funds from participants that had received travel advances, and pay out the travel advances to any participants that had covered their own costs up front. Keep a careful record of your cash payments and receipts, and get a signed receipt from each participant for each transaction. Buy yourself a receipt book to use for this purpose.

Visas

- Check which participants will need visas to enter the host country (you can find this information on government websites) and warn them of this early on. Recommend to everyone that they check with their travel agent whether they need visas, as rules can change quickly. They must also have a valid passport and there may be other requirements that must be met for entry into the country.
- Make sure that all participants apply for a tourist or visitor’s visa, and not a business or scientific visa, which will entail much bureaucratic red tape and could guarantee that they never make it to the meeting.

Health insurance

- Remind participants to buy health insurance, and get any vaccines/ medications they might need to travel to the host country.
3. Workshop Locations

3.1. Conference Rooms and Hotel

Workshop sessions can be held within a hotel’s conference rooms, or at another location entirely (such as a public aquarium or university). Remember that your choice of hotel and facilities will influence the atmosphere at the workshop. For conservation-minded meetings, it is worth considering that a luxury resort might not be the ideal location in which to discuss environmental and social justice issues.

Before choosing a hotel and conference facilities, be sure to visit several yourself and look around. Your choice should be made at least two months before the workshop, or earlier if there is a risk of locales already being booked. Meet with the hotel manager and key staff to get a sense of how well organized they are, and their level of enthusiasm for helping you make sure the conference goes well. Ask them how many other conferences have been held at the hotel, and how these were arranged. This is especially important if the workshop sessions will be held at the hotel.

When choosing conference facilities, or inspecting those of a hotel, look for:
- conference rooms large enough to hold all participants comfortably during plenary sessions, but still small enough to have people able to see and hear each other easily;
- separate rooms to hold breakout sessions in, or a main conference room that is large enough to widely space groups in;
- check the audio-visual facilities (see below);
- make sure there is space outside the main room to set up a secretariat desk and a snack/coffee table, and that bathrooms are nearby.

When choosing a hotel, look at:
- its accessibility to the conference facilities (if outside of the hotel), and to planned outside venues;
- its general location in terms of restaurants, sightseeing, etc. opportunities for participants;
- size and state of the rooms, bathrooms, and halls;
- the restaurant menu and dining room arrangement;
- the number of elevators (especially if sessions are held in the hotel);
- the pool and any other amenities;
- the business center: what services does it offer (e.g. photocopying/ faxing/ computer & internet access), how costly is it, and how accessible.

If there are aspects of the hotel that bother you, but overall you are satisfied with it, talk to the manager about your concerns. They may able to make the changes you request without too much difficulty.
3.2. Outside Venues and Field Trips

Holding workshop sessions at outside venues is an especially good idea if your usual conference rooms are less than exciting, and/or the workshop is being held over several days. Changing locations gets people to think in new ways, while letting them see more of the host city. A good way to put workshop discussions into context is to organize field trips to visit areas, institutes or people related to the meeting’s discussions. You might also think of holding occasional lunches or dinners away from the usual conference dining room.

4. Workshop Staff

The workshop secretariat was described in Section 1.1. Workshop Staff are different from the secretariat, in that they are not involved in any logistic preparations, but have been hired to fill certain specific roles. Before the workshop begins, be sure to draw up a contract with each staff member so that there will be no problems later on when they are paid their fees. If you pay different fees to different staff people doing the same job (e.g. interpreters with different levels of experience) this should be made clear from the start, to avoid any later confrontations.

4.1. Facilitator

The facilitator’s role is to make sure the workshop sessions run smoothly and are productive. They have to designate speakers and referee discussions, making sure every one has a chance to speak and be listened to; they must make sure discussions stay on topic and that time limits are respected. They also direct discussions or help these along when they’ve stalled by summarizing important ideas, bringing up points that have not yet been raised or repeating points that were raised and overlooked.

Choose a facilitator that has experience facilitating meetings similar to the one you are organizing, and preferably that is familiar with the issues under discussion. You will want someone who can be firm, in order to keep the sessions on track, and also who is fun - the facilitator has to be able to keep the group motivated and interested even at the end of a long day of discussions, and good humour helps a lot. Select your facilitator early enough that they can become familiar with the workshop themes, and brief them thoroughly on the goals of the meeting and the backgrounds of participants attending.

4.2. Interpreters

Be sure to hire skilled, professional interpreters for participants that are not fluent in the main language of your workshop. A successful meeting depends on all participants being able to communicate freely, and it will be noticed if interpreters can’t keep up with the workshop discussions. You may need to spend quite a large amount to cover interpreters’ salaries and travel expenses, so anticipate this early on in your budgeting.
Don’t leave hiring interpreters to the last minute, as it can be very difficult to find skilled people on short notice. You should have your interpreters decided on well before the workshop actually begins. Speak to interpreters on the phone or in person before deciding to hire them, and try to get a good sense of their experience and enthusiasm.

You can try to find interpreters through:
- embassies within the host country of countries where the needed language is spoken;
- university language departments;
- NGOs or other agencies that have had to use interpreters;
- government tourism bureaus (they often have lists of professional interpreters for conferences).

It is extremely important to thoroughly brief interpreters before the workshop, and to hold meetings with them at the start and end of every day. They need to be familiar with workshop themes, understand how the workshop sessions for each day are organized and be told what is expected from them as interpreters. Assign someone to observe the interpreters carefully on the first day of sessions, and check that they are consistently in communication with their participant. Take note of how much participants with interpreters are contributing to discussions. Ask the participants as well how they are finding the interpretation.

4.3. Rapporteurs

Rapporteurs’ notes will be the main written record from the meeting, and are an essential backup if the audiotapes fail to record. You should make sure rapporteurs have access to a computer and can type up their notes, either during or after each session. Well-prepared notes can greatly help with the production of proceedings, but it is not an easy job to do. See Part II. for advice on selecting and supervising rapporteurs.

5. Preparation of Workshop Materials and Locations

5.1. Materials to Prepare in Advance

Anything that you can prepare ahead of time will save you hassle once the workshop is really underway. Materials that can be prepared well in advance of the start of the workshop include:

- Name tags
  Make sure you get the spelling of participants’ names right. Give first and last names on the tag, with last names underlined or capitalized. Decide if you want to put titles and affiliations. Use different background colours for the tags of workshop participants and workshop secretariat.
- Participant attendance certificates
• Participation Awards
  You can decide on who gets awards at the end of the workshop, but can have your
  prizes already prepared.
• Banners and Posters
  You can have banners with the workshop title and funding/organizing agency logos
  made to hang in the main conference rooms, and to use in official photographs. If you
  are bringing research or photo posters to your workshop, you will want to prepare
  these well ahead of time.

5.2. Materials to Prepare on Site

You should be on site at the conference location at least one week before the meeting will
begin to make all the final arrangements.

Orientation
For yourself, be sure to find:
• the nearest business center (hopefully the hotel has one, or you can arrange to use
  their offices) to photocopy, send faxes and emails, and most importantly, be able to
  work on the computer and print.
• the nearest taxi stand or other easy transport.
• nearby restaurants, shops, banks, pharmacies, post office – any locations that you or
  participants might need to use.

Supplies
Visit a stationery store and stock up. You’ll probably need to buy:
• pens, pencils, markers, overhead pens, whiteboard pens.
• folders, notepads, envelopes, overhead sheets, flipchart paper (the post-it chart paper
  is especially good).
• scissors, tape.
• Audiotapes.

Assemble the participants’ registration packs. You could include:
• pens, notepad.
• their nametag.
• map of city and tourism information (get these donated from the Tourist Board).
• business card of hotel with its address.
• a final workshop agenda.
• a list of participants and their affiliations and addresses.
• a spreadsheet for their expense accounting, and explanation of the accounting process
to follow.
• any papers you want them to read, or need to distribute before sessions.
• any small gifts that have been donated (keychains, magnets, etc.).
5.3. Preparation of Conference Rooms

Ensure you have all the audio-visual equipment you’ll need for the sessions, and make sure everything works (even the backups). Test this early, so that you have time to find replacements. You might need:

- a podium with a light for speakers.
- flip charts and markers for all breakout groups.
- two tape recorders (one to act as a backup if necessary) and many audiotapes.
- microphones and speakers, if possible hooked up to the tape recorder.
- overhead and slide projector with spare bulbs. (It would be best to have backup projectors available).
- a PowerPoint projector and computer.
- a TV/VCR.
- a video camera and tripod if sessions are being filmed.
- two cameras, one with print and one with slide film, and extra rolls of film.

During the sessions assign someone to be in charge solely of AV: they will test and position all equipment, run all AV during the sessions, help participants arrange their slides at the break preceding their talk, troubleshoot, record all the talks on audio or videotape, etc.

Reserve the main conference rooms early on the day of the workshop, or if possible, the day before, in order to get it set up on time.

- Check with the hotel that you can hang up posters on the walls. If not, figure out how you will get things up.
- Decide on seating plan, and think about minimizing noise – keep breakout groups well spaced.
- Figure out if you will set up a snack/coffee table within the conference room or outside of it. Remember that people setting up for the coffee breaks will make noise and might disturb discussions.

Set up a secretariat desk outside of the conference rooms. This is the desk from which you will register participants, distribute papers for various sessions, collect expense reports and other materials from participants, and so on, so it should be quite large. The desk should be permanently staffed during session breaks, and for a set time before and after each day’s sessions (e.g. 30min).

5.4. Preparation of Hotel and Meals

You will have to organize the room assignments for participants before they arrive, so that the hotel staff know which rooms to check them in to. You should already know through previous correspondence whether people want single rooms or shared rooms, and whether they have preferred roommates. People opting for single rooms must pay the extra cost themselves.
• Ask the hotel for a list of the rooms set aside for the workshop, and assign participants to each room. Be prepared to have to re-arrange your plan as people arrive.
• You might want to have all the participants placed on the same floor. This makes it easier to find everyone, encourages interaction, and lets you communicate with people by leaving messages on a message board in the lobby.
• Keep the workshop organizers and secretariat’s rooms close together.
• Post the room assignments somewhere central, so that participants can find each other easily.
• Check out all the rooms you will be using, and tell hotel anything you don’t like.
• Discuss with the hotel manager or staff flowers, plants, any special decorations for banquets, any special touches to participants rooms (e.g. welcome fruit baskets, or flowers/chocolates on the pillows each night).

You should decide on the menus with the hotel staff for any meals they are catering.
• Decide on the meal plan for the workshop. How many meals are covered? Is everything covered? If you exclude some items (such as alcoholic drinks) you have to be very careful that the waiters realize this, and bill each participant for their consumption of non-workshop covered items. Check after every meal to begin with, because it is easy to have extra charges put on the workshop bill.
• Decide if you will use a seating plan in the dining room or will just let people sit where they want to. The advantage of this is that people can just relax on their breaks and talk to who they want to, but on the other hand, a seating plan may encourage people to talk to people they wouldn’t otherwise have gotten to know.
• Make sure you know who the vegetarians are, and the hotel staff does as well (by sight), so as to serve them the right plates. You may want to opt for buffet meals.
• Coffee, tea and juice should be available at each snack break, together with a snack!

5.5. Photos

To document the meeting, you should have photographs taken of the participants in workshop sessions, giving presentations, and at outside venues. The person in charge of audio-visual for the meeting can take these photographs. You may want to hire a professional photographer to take the group shot of workshop participants, and to document at least one workshop session, so that you are sure of having high-quality shots for use in publications.

5.6. Preparation of Outside Venues

Be sure to reserve any transport you will need to get to and from the venues, and arrange catering if necessary.

Send someone from the workshop secretariat to the outside venue early on the day the workshop is meant to go there, in order to oversee that the arrangements you agreed on are being made, and to deal with any last minute problems.
5.7. General Notes on Planning

To help keep your planning on track, you should:

- draw up ‘to do’ lists every day for the week or so before the workshop, and during the workshop. Split up the work to be done between your secretariat members.
- prioritize all tasks, and get everything that can be done early out of the way. Never put anything off that can be done right away.
- reconfirm all of your arrangements twice. Never assume that everything is sorted after one meeting or phone call—always check again.
- meet at the end of every day with the secretariat to review everyone’s to do list, and confirm what still needs to be done tomorrow. When the workshop is in session, this meeting is also a chance to discuss what problems there were that day, and how they could be avoided the next day. Have a hotel room reserved specifically for these secretariat and staff meetings, and keep it well stocked with snacks.
- keep good notes of what is and isn’t working out, to serve as guidelines for the next person organizing a workshop.

6. Once the Workshop is Underway

6.1. Airport Pickups

You might want to meet participants at the airport, and either have transportation waiting for them, or show them where to catch a taxi/bus to their hotel. You should send two people at a time to wait at the airport, so that they can keep each other company between flights, and so that one can wait at the gate while the other helps participants with their transportation arrangements.

6.2. Registration

You can decide when registration should be—maybe first thing in the morning on the first day of the conference, or in the evening before an opening reception on the day before sessions start. At registration, hand out the workshop registration packs and introduce yourself to participants. If the workshop is being held outside of the hotel, you may want to have some information waiting for participants at their hotel, so that they know where to go to register, for example.

Be sure the hotel desk staff has a list of participants and the room assignments you have decided on ready for when participants begin to arrive.
6.3. Session Schedule

Decide how early you want to start workshop sessions, and when you want them to end. It’s frustrating to constantly have sessions run over their allotted time, which is where a good facilitator will be useful.

Keep the schedule flexible, so that you can respond to participants’ needs. For example, a particular topic might elicit more interest than anticipated, and participants will want an additional session to continue their discussions, meaning that something else will need to be cut.

7. Other Considerations

7.1. Media

You may want to draw the media’s attention to your workshop. Ideally, you will be working with a partner (e.g. Shedd Aquarium, Zoological Society of London) that has an active media relations department, and that can take care of this aspect of the workshop planning for you. If your partner does not have its own media relations department, you should still consult Project Seahorse’s contacts at UBC, Shedd or ZSL for advice on press releases, press conferences and media people to contact. Planning for the media should begin early on.

7.2. Rapport with Funding Agency

As the workshop co-ordinator, you will likely not be the person awarded the grant funds for the organization of the workshop, but you will be responsible for maintaining the grant holder’s good reputation with the granting agency. This means you should be aware of all of the requirements of the grant contract, and know what financial and technical reporting will be expected from the agency for the project you are co-ordinating. You are not authorized to get in touch with the granting agency on any substantial matters without first consulting your supervisor, and must copy your supervisor on all correspondence. To keep in good relations with the funding agency:

- make your own copy of the grant proposal and the terms of agreement between the granting agency and your supervisor. Consult it often to remind yourself what your objectives are, and what the funding agency will be expecting.
- ask for help when you need it, and ask early on. The funding agency probably has a lot of experience with projects similar to your own, and might have advice or good contacts to share. They often have their own workshop planning departments, or guidelines on report and proceedings preparation.
- know what topics the granting agency expects you to cover in your final technical report (e.g. involvement of women, projected outputs), and jot down notes as issues come up that could be included in the report.
• try to meet all of the agency’s requests promptly. If your project is running behind schedule, be honest, and ask for a reasonable extension early on. In your final report, be sure to acknowledge when the funding agency has been flexible.
• look at some examples of final financial and technical reports when you are preparing your own. For the financial report, you can work closely with your account administrator to make sure the final product meets the granting agency’s requirements.

7.3. Help!

Many different people will help you pull this workshop together, but you won’t remember to thank them all if you don’t keep a running list. Do it, otherwise you will feel terrible when it comes time to write the acknowledgments section of the workshop proceedings, and you just know you’ve left someone off...
PART II. PREPARING WORKSHOP PROCEEDINGS

8. Groundwork

8.1. Outputs/Proceedings Co-ordinator

Although the workshop co-ordinator could be responsible for the publication of workshop proceedings, designating a second person to take charge of this task has several advantages. The outputs co-ordinator could:

- correspond with participants before the meeting to request that they submit papers, posters, or give presentations, and handle any questions they might have as to this aspect of their meeting preparations;
- attend the meeting and help participants prepare their presentations (e.g. set up slides, make photocopies of materials to distribute);
- supervise the rapporteurs and take their own notes for use in preparing the proceedings;
- collect any materials from participants that will be used in the proceedings;
- oversee the preparation and publication of the proceedings in a much shorter time than the workshop co-ordinator could, given the latter’s responsibility to finish the financial and technical reporting; and
- follow up on the outputs recommended by participants in workshop discussions.

This last point is an important one, as it is too easy for the enthusiasm generated at a conference to fail to carry over into producing tangible results. Hiring an outputs co-ordinator for the 6 months to 1 year after a workshop might be enough to keep the momentum from the meeting going long enough for it to take on a life of its own.

8.2. Proceedings Budget

The budget for your proceedings will depend on the type of document you are preparing, how many copies you will need, and whether you are planning to translate it. Some items you might need to budget for are:

<table>
<thead>
<tr>
<th>Publication &amp; Distribution</th>
<th>Materials &amp; Supplies</th>
<th>Salaries &amp; Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printing</td>
<td>Computer for proceedings co-ordinator</td>
<td></td>
</tr>
<tr>
<td>Envelopes &amp; Packaging</td>
<td>Audio tapes</td>
<td></td>
</tr>
<tr>
<td>Postage fees (surface mail)</td>
<td>Computer rental for rapporteurs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Stationery &amp; CDs</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Proceedings co-ordinator salary &amp; benefits</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Rapporteurs’ fees</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Professional transcription service fees</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Editorial fees</td>
</tr>
<tr>
<td>Communication</td>
<td>Translation cost per word</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rental of computers for translation work</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Overheads</td>
</tr>
<tr>
<td>Long distance fax/ phone to participants</td>
<td></td>
<td></td>
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<tr>
<td>Courier</td>
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</tbody>
</table>

This table provides a summary of the various costs that may be incurred during the preparation of workshop proceedings.
8.3. Session Recording – Audiotapes & Rapporteur’s Notes

To prepare the workshop proceedings, you will depend on submissions by participants, transcriptions of audiotapes, and notes taken by yourself and the rapporteurs during the sessions. The best suggestions for obtaining an accurate record of the workshop are:

(1) to rely the least amount possible on recordings of the workshop sessions, and to try instead to get as many written submissions as you can from participants (e.g. the texts of their presentations, clear notes from their breakout group discussions);
(2) to invest in a professional transcription service to obtain a complete record of the workshop discussions from the session tapes. You can transcribe the tapes yourself, but it will take many, many, many hours and will not be cost-efficient in the end anyway. (The amount of detail you are planning to include in the proceedings will determine whether or not you really need a complete transcript of the meeting sessions).

Audio Tapes
No matter how good the workshop rapporteurs’ notes are, you will always need to check a statement or verify a speaker by listening to the session audiotapes. The recorded tapes are priceless, and you must make every effort to ensure that the audio equipment is working at every session. Have two machines recording, if possible, or at least have a second machine ready in case the first breaks down. Have a good supply of tapes, and make sure that they are switched as soon as their time has run out. Practice recording before the workshop begins so that you can be sure that the tape machine can pick up talking from different areas of the room. Try to have people use microphones if this makes it easier to record them. You will need those tapes, so take the time to set everything up properly!

You should ask the facilitator to remind everyone to identify themselves each time they make a statement, so that when you are listening to the tapes later on you will be able to identify the speaker.

Label the tapes immediately after each session, on both sides, so that later on you can easily organize the tapes, and find the sections you need to listen to more easily.

You can ask the rapporteurs to switch the tapes, or designate someone to be responsible for audio-visual equipment. You might want to use a discrete timer/alarm to remind them to flip the tape when a side is full.

Rapporteurs
Don’t expect too much from rapporteur’s notes. Rapporteurs should be seen as a backup to the audiotapes in case these fail, and not as an equivalent. They cannot, for example, take good enough notes on speakers’ presentations to be able to reconstruct the talks later for use in the proceedings. When people are talking quickly, or for a long period of time, the rapporteurs cannot be expected to keep up.
Try to have two rapporteurs that can **split the work** between them. They should sit next to one another and somewhere where they can see all of the participants, so that they always know who’s speaking. Give them a list of participants and make sure they can recognize everyone by sight. Rapporteurs can take turns taking notes, or both take notes and merge them at the end of the session. Taking turns is probably more efficient and less tiring.

Choose as rapporteurs people who are **genuinely interested** in the workshop, and in doing a good job. Taking notes is difficult and boring, and if the person you’ve chosen isn’t interested in the first place, you’ll have some very bad notes to work with. Look for enthusiasm, good English skills, and if possible, some familiarity with the workshop topics.

You can have rapporteurs **use computers** if they are fast typists, or take handwritten notes and then type them up on the computer at the end of each session or day. Do NOT accept handwritten notes. The rapporteurs will probably be using incomprehensible shorthand in their notes, so you want to make sure they retype them and fix any confusing bits.

**Brief the rapporteurs thoroughly** before the meeting starts on what you are expecting from their notes. I would suggest telling them:

- **not** to try to write down everything participants say, word for word, but to concentrate on getting the main point of their statement clearly across. This is difficult, because they shouldn’t put any words into people’s mouths
- to make sure they’ve gotten the name of the speaker
- to note if someone’s tone is angry, conciliatory, etc.
- to be sure to collect any materials they can from speakers or breakout groups, and to type these up into their notes.

Overall, I found rapporteur’s notes to be unreliable, because I couldn’t be sure that they had properly quoted speakers. I ended up listening to all of the session tapes, and transcribing long sections in order to augment the rapporteurs’ notes. Where the tapes had not recorded I was **very** glad to have the rapporteur’s notes, however, so it’s still worth having them at the meeting.

You might be able to **improve the quality** of the notes by sitting down at the end of each day with the rapporteurs and going through their notes, filling in missing information and making suggestions of how they might improve their note taking the next day.
9. Proceedings’ Content

9.1. General Outline

You should have a sense even before the workshop begins of what you would like to include in the workshop proceedings. This will allow you to give participants a fair warning as to what to prepare for the workshop, and also means that you can start assembling the document even before the meeting starts.

Depending on the type of meeting you are holding, it could be easy, or difficult, to find examples of proceedings to follow. There are many examples of academic workshops built around formal paper presentations, but fewer of discussion-focused meetings. Look for these types of proceedings from conservation meetings, but don’t expect to find the perfect model to follow. You will need to decide for yourself what format will best further to aims of the meeting.

Below is the general table of contents followed for the three proceedings published from the 1998 Seahorse Management & Conservation Workshop Series. All three were discussion-focused meetings. The items marked with a star (*) are direct contributions from participants:

**Part I. Background**
- Sponsor’s Note (from the funding agency)
- Introduction from the workshop organizers
- Executive Summary
- Description of Project Seahorse
- Description of Workshop Series (if the workshop is part of one)
- Workshop Agenda
- List of Participants

**Part II. Workshop Preparation**
- Explanation of Workshop Preparation Process
- Workshop Outline
- Summary of Briefing Papers

**Part III. Workshop Report**
- Editors’ Introduction (explaining how report is organized)
- *Abstracts of Presentations
- *Presentation Summaries (or Papers Submitted)
- Summary of Workshop Discussions
- *Informal Reports from chosen participants on the meeting

**Part IV. Workshop Participants**
- *Participants’ Contact Details
- *Short Biographies/ Summary of Work

**Part V. Workshop Context**
- Seahorse Workshop Series Summary Reports
- Project Seahorse Position Statements
- List of Acronyms
- Workshop Secretariat and Staff
- Acknowledgments
9.2. Description of Sections

A. Background
The materials included in this section are easy to put together, and most can be prepared by the co-ordinator themselves. Try to get the sponsor’s note shortly after the meeting has taken place, preferably from someone at the granting agency who actually attended the workshop.

B. Workshop Preparation
In this section, you can give a sense of the time and energy that participants put into their workshop preparations. Maybe they were involved in e-mail discussion groups on workshop topics, or were asked to read and comment on briefing documents. You might then want to include some of the conclusions come to by the email groups, or summaries of the key briefing documents.

C. Workshop Report
This section deals directly with the workshop presentations and discussions, and represents the bulk of the proceedings.

Presentations
For the 1998 workshop series, participants were asked to give presentations, but not required to submit any written versions of their talks. This was a mistake. The rapporteurs notes alone were not reliable enough to base any summaries of speakers’ presentations on. In order to not misquote any participant, editors had to transcribe the audio tape recordings of the presentations, and then prepare concise and consistent summaries of each participant’s presentation. The lesson learned was that, wherever possible, have the participants do the work instead! You should:

• Ask participants early on in the workshop preparation process for any materials you will require from them, especially if you are requesting a presentation or paper submission. If participants are bringing posters, you might ask them to write up an abstract of the poster for inclusion in the proceedings.
• Clearly lay out the formatting to follow for the submissions, and require participants to hand in to you hard copies and electronic versions of their work at the workshop. Do not leave the workshop without having collected these, or else you will have to chase over email, fax and phone.
• Make sure to collect any materials speakers distribute to the audience at the workshop, and any overheads they use during their talk. These might be usefully included in the proceedings.

Ideally, you should be able to include participants’ submissions as is in the proceedings. If you do need to make any changes, be sure to get the participant’s written approval of the final version you’ve prepared.

If participants are submitting academic papers, you may want to have these refereed. By having papers reviewed by experts, you will definitely improve the quality of the
information presented in the proceedings, and possibly avoid it being lumped with the large quantity of grey literature available on conservation topics.

There may be question and answer periods after speakers’ presentations. You can decide if you will include all or only some of the Q&A exchanges – these can sometimes be very interesting, and make the participants seem more ‘alive’ to the reader.

Workshop Discussions
Your goals in summarizing the workshop discussions are to:

• give readers a sense of the main themes under discussion at the workshop;
• make clear what points were controversial (and why) and which were unanimously accepted by participants;
• show the process which participants followed through the workshop sessions to arrive at the final action plan/ summary statement/ etc. of the meeting; and
• present any action plans/ summary statements or resolutions decided on by the group.

To prepare summaries of the workshop discussions, you will have to rely on audiotapes of the sessions, and notes taken by yourself, the rapporteurs and possibly other participants at the workshop. Much of the workshop discussions will probably take place in breakout groups, with the different groups coming together in plenary at the end of each session to share their results. It is easier to take notes at the plenary session than it is to follow the discussions of each breakout group. You might assign a participant to be a rapporteur in each breakout group, and make a copy of his/her notes, or you might just concentrate on reporting the results that each breakout group presents in plenary, and not worry about recording all the discussions within the breakout groups. Whatever you decide, make sure to collect any overheads, notes, or flipchart pages used by breakout groups in their group discussions or in their plenary presentations, since these will probably represent the best record of the results of their discussions.

In the text of the proceedings, you can often summarize the results of a workshop discussion session using a table. This table needs to be placed in context, however. You should introduce the table by explaining how the session was organized (e.g. number and composition of breakout groups, guideline questions or instructions participants were asked to follow), then show the table, and then conclude with a paragraph summarizing the results of the table. An example is given below:
Session I. Problems & Limitations

Guidelines:

1. How does your group define sustainable use of marine species for TM?
2. What does your group consider to be the major obstacles to achieving this goal? Brainstorm for ideas then sort them as indicated.

<table>
<thead>
<tr>
<th></th>
<th>Local (Loc)</th>
<th>National (Nat)</th>
<th>International (Int)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minor (1)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medium (2)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Major (3)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Outputs: Here, the proceedings editors included each group’s definition of sustainable development, and a single table merging the tables produced by each breakout group in answer to guideline question 2.

Synthesis:

Most obstacles to sustainable marine medicinal management were considered to be major, whether on the local, national or international scale. Problems that needed to be addressed on the international scale were the most numerous. Obstacles that were mentioned by several groups included lack of biological knowledge, poverty and lack of alternative livelihoods in dependent communities, habitat degradation, negative environmental effects of aquaculture, and lack of research funding. Potential problems with developing sustainable aquaculture seemed to be of great concern to participants. They listed as concerns (among others): the introduction of disease, exotic animals and polluted water by culturing; the escape of cultured fish; reliance on wild food and seed; and potential conflict with dependent communities. The imbalance between supply and demand for marine medicinals was recognized as an important obstacle to trade sustainability. Lack of controls, monitoring or enforcement of trade and environmental legislation were also mentioned in several contexts.

At the end of the workshop report, you should leave the reader with some take-away messages. The workshop participants might have already come up with these in their final workshop session (e.g. developing an action plan, or a summary of the main workshop messages), or you might have to do this work yourself, going through the text and pulling out the key points.
Participant's Reports
You might want to ask a few participants to submit reports on their impressions of the workshop. It could be interesting to read about the day from their perspective.

D. Workshop Participants
You should include complete contact details for each participant in this section. A short biography/description of their work written by each participant is also a useful addition to this section.

E. Workshop Context
If the workshop was part of a larger series, or followed from some previous event or discussion (e.g. a popular session on seahorses at a larger ichthyologist’s conference led to the organization of a seahorse-focused meeting), give this context here. You could include the executive summaries from other workshops in the series, for example.

You might also want to include position statements from Project Seahorse or other organizations (e.g. IUCN, or Taxon Advisory Groups) that are relevant to the workshop discussions in this section. (See ‘Editing Style’ below).

F. Miscellaneous
Be sure to include a list of all acronyms used in the text.

You may want to include a list of workshop secretariat and staff, as these people played an integral part in the success of the meeting.

By the time you are writing up the acknowledgments section, you will have completely forgotten all of the people that helped with the workshop along the way, unless you’ve kept a running list. The acknowledgments should include everyone who has helped with the workshop and with the proceedings, so both the proceedings and workshop coordinator should keep a list.

9.3. Editing Style
• Remember that many of the people reading these proceedings were not at the meeting. You need to make it easy for them to follow the process of the workshop, to absorb the key information presented at the meeting, and to get a sense of the mood prevailing among participants. One way to do this is to put explicit signposts throughout the text, clearly linking the different workshop sessions together. For example, try to write an introduction to every section (the section being the text of a presentation, or of a workshop discussion), present the section itself, and then close with a concluding statement/paragraph summarizing the section. In these concluding/synthesizing statements, you could comment on the mood characterizing that session of the workshop (e.g. ‘All participants strongly agreed’ or ‘there was some definite disagreement among….’).
• Be careful never to put words into anyone’s mouth as you are writing up the proceedings. If you’re not sure of what the speaker said and guess at a word, or if you
think it would sound better if you added a word here and there, you’re misquoting them. If you aren’t going to stick exactly to what people say (and to be honest, you really shouldn’t—most peoples’ spoken words will not translate well into written speech), just be sure to get their approval for the version you prepare. Send a near final copy of any section of the proceedings in which they are quoted to each participant, and ask them for their written approval of the comments you’ve attributed to them.

• You should have a general note somewhere in the proceedings that the opinions expressed by the participants are not necessarily shared by the workshop organizers. For example: “Opinions expressed in the proceedings are those of the participants. Any questions or comments should be addressed to them. The editors did not attempt to verify/validate comments, but have occasionally inserted editorial notes for clarification”.

• If participants have said something obviously misleading, or mistaken, you can tactfully try to correct this by inserting an editor’s note, or by referring readers to a position statement included in the proceedings that contains more accurate/up-to-date information. This could come off as heavy handed in some situations, so think carefully about doing it.

• Decide on a standardized approach to using people’s names, especially if there is a mix of Asian and Western participants at the meeting.

9.4. Formatting

Don’t underestimate the time and headache required to format the proceedings! You will save yourself an incredible amount of hassle if you decide right from the start what formatting style you would like to follow throughout the entire document. Try to figure out everything—from the font size of the main text and all headings to the page setup and stylistic touches (e.g. bolding, italicizing, shading)—before you start putting the document together. Otherwise, after having organized your 200 page document a certain way, you might decide to change the margins, for example, and have to readjust all the sections so that the page breaks work.

Use the template function in Word, or choose another word processing/publishing software you are familiar with. By setting up a template, you need only make a change in the template box, and the change is automatically made throughout the text (e.g. all ‘Heading 1’ sections changed from Font 12, Times, Bold to Font 14, Times, Italicized). This will make your job much, much easier.

Decide on your spelling from the start – will you follow American, British, or Canadian spelling? And what’s the difference? Figure it out early on, and keep a list besides you of any words with ambiguous spelling so that you always remember to spell it the same way. You don’t want to have to search through your text changing all the ‘ise’ to ‘ize’ or ‘our’ to ‘or’.
When you open up the cover of the proceedings, the first page (right-handed page) should be an exact copy of the outside cover page. On the reverse of this inside cover page, you should print all of the citation information (ISBN, CIP, Publisher’s address, etc.)

**Page numbering** in Arabic numerals (1,2,3) begins after the citation page and table of contents. Earlier pages can be numbered with roman numerals (v, xi)

It is standard procedure in publications to **begin each new section on a right hand (odd-numbered) page**. Watch out for this. Also, if you need to leave a page blank so that the next section starts on a right-hand page, you do not print a page number on the blank page, but you do count it as a page. For example:

Page 1 - Introduction (1 page long)

[Page 2 - blank- no page number shown]

Page 3 - Workshop Executive Summary (2 pages long)

Page 5 - Workshop Agenda

You may want to insert a **break page** introducing each new section of the proceedings, especially if you are dealing with a large document and want to make it easier for the reader to navigate. The break page could be a different colour, or have a strip of colour along the side, but should definitely be distinctive in some way. Like blank pages, the break pages are counted in the page numbering scheme, but don’t have a page number printed on them. The break page must be on a right-hand page, and then the section must start on the next right-hand page, leaving one blank page (i.e. the reverse of the break page) in between.

Be sure to keep your **headers** consistent. You might want to always have the workshop name, the title of that part of the proceedings, and the specific title of that section of the part. For example:

<table>
<thead>
<tr>
<th>IDRC Workshop on Marine Medicinals</th>
<th>Part I: Background Executive Summary</th>
</tr>
</thead>
</table>

**10. Publication**

**10.1. ISBN & CIP**

You should obtain an ISBN number for your proceedings, and might want to consider registering it with the National Library of Canada (or the country of publication).

**Contact Information**

National Library of Canada
http://www.nlc-bnc.ca
or call (819)-994-6872 (ISBN), (819)-994-6881 (CIP), (819)-997-9565 (Legal Deposit)

The National Library of Canada, has very clear information explaining what purpose ISBNs and CIPs serve, together with application forms:

The Shedd Aquarium Library Staff can offer advice as well (though they aren’t familiar with the Canadian system).

**ISBN Numbers:**
Project Seahorse holds blocks of:
- ISBN numbers with the British Library
- ISBN numbers with the National Library of Canada

These blocks (i.e. series) of ISBN numbers are reserved exclusively for Project Seahorse’s use. You simply have to get in touch with the ISBN section of the national libraries, and confirm with them which number to use next.

If you’ve run out of ISBN numbers, it is easy to request more, and free of charge. Look for information and application forms on the National Library of Canada’s website.

**CIP Numbers:**
Cataloguing-in-Publication is a service of the national library. Their librarians use an internationally standardized formula to come up with a code and keywords describing your document. This CIP information is then distributed to searchable library databases and publishing houses, so that people can find out that your publication exists, and can contact you to place orders. Getting a CIP number isn’t a necessity, although we did it for the marine medicinals proceedings.

It is best to have the book catalogued in the country it is being published in. In Canada, you fill out a CIP form (available from the website), and send in descriptive portions of your publication (title page, introduction, preface, executive summary, any publicity materials) to the CIP agent in your region (phone number as above).

NB: Obtaining an ISBN and CIP number in Canada takes 10 days, and you can apply for the numbers **well in advance** of printing.

**Legal Deposit:**
If you register your document with the National Library of Canada (by using an ISBN and/or CIP number), you must meet their legal deposit requirements:
- Two copies must be deposited when 101 or more copies are made
- One copy must be deposited when more than three but fewer than 101 copies are made

The law requires all Canadian publishers to deposit (at their expense) copies of their works. There is a form to fill out (not mandatory), and the work should be deposited within one week of release.
Copyright:
To copyright your publication, you just have to write, preferably on the inside cover page, ‘Copyright ***’. The publication should be copyrighted to an individual, since Project Seahorse has no official legal status.

Example of Copyright, ISBN & CIP information:
From the marine medicinals workshop inside cover page

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Canadian Cataloguing in Publication Data
International Workshop on the Management and Culture of Marine Species Used in Traditional Medicines (1st: 1998: Cebu City, Philippines)
Proceedings of the First International Workshop on the Management and Culture of Marine Species Used in Traditional Medicines: July 4-9, 1998, Cebu City, Philippines

(Proceedings from Project Seahorse)
Co-published by IDRC Canada
ISBN 0-9686503-0-9

I. Moreau, Marie-Annick, 1976–. II. Hall, Heather J. III. Vincent, Amanda C. J. IV. International Development Research Centre (Canada) V. Project Seahorse VI. Title. VII. Series.

RS160.7.I58 1998 333.95'6 C99-901691-1

10.2. Printing

The proceedings from the 1998 workshop series were ‘published’ by Project Seahorse, which simply meant that we brought the documents to a commercial printer and took charge of publicizing and disseminating the printed copies ourselves.

Depending on your budget, you will have to decide how much to spend on printing. For the marine medicinals proceedings, we brought a high-quality computer print-out version of the proceedings to the McGill Printing Service, and they made 100 high-quality photocopies of the document. The type of binding you choose will affect the price, as will any use of colour. Call around to different printers to get their price quotes once you know how many pages your document is and know how many copies you want.

The printers will make a proof copy for you to check over before they proceed with the complete print run. Make sure there are no mistakes with the proof, and look specifically for mistakes with page numbers, and sections beginning on odd numbered pages.

10.3. Dissemination

You should send a complimentary copy of the proceedings to each workshop participant. You might also want to send free copies to:

• participants who were invited but could not come
• funding agencies
• any individuals or groups that gave advice to workshop organizers on participants to advice or on any other aspects of the workshop
• academics, conservation groups, libraries or other interested parties that might be interested in the workshop topic and are well placed to share the document with a larger audience.

Keep a running list from day one of your job of the people who deserve or have requested copies of the proceedings.

You can advertise the existence of your proceedings by:

• posting a notice on the Project Seahorse website, and possibly other websites as well
• e-mailing the workshop executive summary and an ad for the proceedings to Project Seahorse contacts
• distributing the executive summary and ad for the proceedings at related meetings.

You should have included in your budget enough money to cover packaging and postage fees for at least a portion of your proceedings. You can also hold some copies back to sell to people. Make sure to assign some copies permanently to Project Seahorse, and to take a few for yourself.
11. Translation

If your workshop is of interest to a group where a large proportion do not speak English, it is definitely worthwhile to consider translating the proceedings. An academic meeting on syngnathid biology, for example, might benefit from translating at least portions of the proceedings into Spanish, as there are many Latin American syngnathid researchers.

Try to select a translation team that (1) has experience with translation and, perhaps more importantly (2) is familiar with the workshop themes under discussion. Draw up a contract before the work begins. Make clear that you expect tight quality control, and that you will not pay any extra fees for the correction of any mistakes made by the translation team. Below is sample contract for translation of proceedings from English to Chinese:

<table>
<thead>
<tr>
<th>Translation Rates</th>
</tr>
</thead>
<tbody>
<tr>
<td>We (Project Seahorse) will pay the following rates (all amounts in US$):</td>
</tr>
<tr>
<td>• $15.00 per 1000 English words translated into correct Chinese</td>
</tr>
<tr>
<td>• $3.00 per 1000 English words input correctly into Chinese computer text</td>
</tr>
</tbody>
</table>

Computer input should follow wherever possible the format in the original English document (e.g. the same words should be bolded, underlined, etc. as appropriate). The lines of computer text should be numbered (to facilitate corrections).

<table>
<thead>
<tr>
<th>Quality Control &amp; Corrections</th>
</tr>
</thead>
<tbody>
<tr>
<td>For each section of the text:</td>
</tr>
<tr>
<td>1. Before the draft translation is put into the computer, <em>the translation supervisor</em> will proofread and make corrections to the draft.</td>
</tr>
<tr>
<td>2. After the text is input, <em>the translation supervisor</em> will proofread the computer copy, verifying format and text. He will make appropriate corrections.</td>
</tr>
<tr>
<td>3. A translation team staff member will be assigned to do a third check, again verifying format and text.</td>
</tr>
<tr>
<td>4. The draft will then be sent to outside readers for a final check. These outside readers will be coordinated by &quot;the outputs co-ordinator&quot; and paid by Project Seahorse.</td>
</tr>
<tr>
<td>5. The translation staff will incorporate the readers’ corrections into the text, to produce the final version.</td>
</tr>
</tbody>
</table>

Corrections made at any step in the quality control process are the responsibility of the translation team. Project Seahorse will not pay for the correction of mistakes, unless a major formatting or textual change is requested by Project Seahorse after translation work on the section has already begun. It is the responsibility of Project Seahorse to provide correct copies to the translation team at the start of translation.
Security
To prevent the translation and computer input work from being lost, *the translation supervisor* will be responsible for:
- ensuring regular back-up of computer work, and printing hard copies.
- keeping an updated copies of the translation work at home (i.e. outside of the office) in case of theft.

Project Seahorse will not pay for having to redo lost or corrupted sections of the text.

Other Costs
We are also able to cover:
- computer rental for 1 month at $70.00
- computer disks to a total of $10.00
- all related stationery, photocopying, faxing, telephone and courier charges to a maximum of $285.
  **Any further costs should be discussed with Project Seahorse for approval before they are incurred**.

Payment
Payment will be made through **. Approximately half of the funds will be sent by wire transfer upon signing of the memorandum, and the balance of funds upon completion of the work.

You need to decide if you’d like the translation work to proceed *concurrently with the write-up* of the English version of the proceedings (i.e. you send off sections to be translated as soon as they are ready) or whether you would prefer to complete the English version and then send the entire document to be translated. If you send off sections for translation when you think they are done, you might find yourself making changes to those sections later on, and having to ask for re-translation of small parts of the text. Also, it means that you have the added stress of trying to meet the deadlines you’ve set to the translation team, because if you’re late with a section, they’re sitting idle. If the time allows, I would suggest beginning the translation once the English version is finalized.

In either case, you may want to *hold off on printing* the English version until the translation is completed, as the translators might pick up on mistakes that you’ve missed.

Be sure in the translated version to *acknowledge* the contributions of the translating team, and to include their names on the inside cover page.

You will be at a disadvantage if you can’t speak the language of translation, and yet are trying to manage the translation project. Make sure the translated document is reviewed by a knowledgeable and bilingual *outside reader* before it is finalized. If this is a team member, you can also ask them to compare the translated text with the original for any changes. You may not want to impose on a non-team member’s time in this way.
Think about where you want to have the translated version of the proceedings printed, and where it makes the most sense to mail them from. If you’re dealing with Chinese characters, you may not be able to recognize any mistakes or make any last minute changes yourself, and so it might make sense to have the translation team take charge of printing up the document and mailing copies to Asian contacts.

Even if the translated proceedings are printed outside of Canada and in another language besides French or English you can still register the translated document with the National Library of Canada, and use one of Project Seahorse’s ISBN numbers.
Appendix 1. Organizing Workshops Abroad

If you are organizing a workshop abroad (e.g. planning from Canada for a conference that will take place in the Philippines) there are added complications to the workshop preparation process. Some of these are discussed below.

A.1. Organizational Staff
It is essential that you designate a counterpart assistant – someone working in the host country who will be in regular contact with you, and who will be able to make arrangements on site that you can not easily take care of from your home base. For example, the counterpart could meet with hotel staff to make sure preparations for the workshop are underway, could help participants obtain visas by providing support letters, or could be interviewing potential local staff for the meeting. You should not organize a meeting abroad without having strong contacts in the host country.

A.2. Banking Arrangements
If you are holding the workshop in a foreign country, you will need to find a way to move funds overseas. You will need cash on hand once at the workshop to pay a number of in-country costs, and it could add up to a considerable sum. Ideally, try to arrange to pay as many costs as you can from your home country, to reduce the amount of money you have to move. For example, you may want to arrange a wire transfer to the conference hotel to pay the workshop bill, although this may not always be possible. Below are some thoughts on transferring funds abroad:

• Don’t carry the money over with you in cash. Often there are restrictions on the amount you can bring in to a country, and there is also the chance that you will get robbed. If absolutely necessary, you could split the money among several team members going out with you so that no one is over the maximum allowable amount and there’s less risk of losing everything.

• Avoid changing large sums into traveler’s cheques, unless you have budgeted for the loss due to service charges.

• Bank drafts can be risky because the recipient bank might hold the draft for several weeks while they run a background check on the transaction.

• The best option is to transfer the funds to an in-country bank account. It may not be possible to open a bank account unless you are a citizen of the host country, and the account will probably have to be opened in person. If eligible, you can open a bank account when you go on your reconnaissance trip to the host country (see below). Alternatively, a local team member or a counterpart agency may agree to open an account in their name for your use, or hold funds in their existing account. They will probably need some money with which to open a new account that will have to be advanced or reimbursed to them. You will need to arrange how money will be withdrawn from the account once it is open. If transactions are over the counter, and you aren’t authorized to use the account, you will need to have the account holder on hand whenever you need to withdraw funds.

• Wire transfers are slow, and there are often mix-ups with them. Be sure that you have all the necessary information for the transfer, and follow up on it every few days to make sure it has not been held up.
• Because you may get to the workshop country before the wire transfer does, it is a good idea to bring enough money (in cash and/or traveler’s cheques) to pay for the first week’s expenses.
• When the workshop is over, withdraw all remaining funds from the bank account, and be sure to get a record of all transactions made on the account. You may want to keep the account open if there are plans to work in that country again; you will need to find non-workshop funds to keep in the account in order to keep it open.
• Important!! For all financial transactions, keep careful track of exchange rates received and service fees paid. Keep all receipts from exchanges, but also record in a notebook the amount you handed in to exchange, and the amount you received in the other currency. This is because the receipts are often unclear, and difficult to interpret after the fact.
• Hunt around for where you get the best exchange on your money. It may not be at the bank or the hotel.
• Keep very good note of the currency exchange rate you are getting. When you exchange money, write down how much you changed in the original currency, and how much you got back-- then calculate the rate. This will take into account any service fees that might have been charged you.

A.3. Reconnaissance Trip
If you are organizing a workshop in a different location from where you yourself are based, you will want to arrange a reconnaissance trip to the meeting site at least two months before the event will happen. On this trip, you can choose hotel and conference facilities, interview potential workshop staff, make banking arrangements and basically familiarize yourself with the location. At this time, you should also select a counterpart assistant and get to know the people you will be working with during the workshop, such as other team members.

A.4. Locating Interpreters
It may be that you cannot find professional interpreters for certain languages working within the host country. In that case, you could:
• contact diplomatic offices in the host country, as they often have lists of interpreters on hand.
• fly in an interpreter from another country. It may be expensive, but it is better than hiring a non-professional.
• invite a colleague of the participant’s that has a better knowledge of the workshop language to the meeting, so that they can work together.
• take a chance on hiring a bilingual student with no formal interpretation experience, but be sure to interview them beforehand. You do not want to hire anyone who seems nervous, shy, or so completely unfamiliar with workshop topics that they won’t be able to function.

A.5. Field Trips
If you are bringing participants to a remote field project site (e.g. the Handumon project site in the Philippines), be careful! Preparations will vary depending on the site, so you should design your trip in careful consultation with the local field workers. The trip
should be approved by the community, and they should be fully involved in the preparations and running of the field trip. **Plan meticulously.** You will need to overcome the many daunting logistic challenges that come from welcoming a large number of people to a village without modern amenities. You may want to rehearse the day in advance, particularly if special activities are planned, in order to identify any problems with the day’s program. Holding such a trip can offer a way to bring extra income into the community (e.g. by hiring construction labour, or catering services), while also serving to build organizational skills among community members.