**Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Institution:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

| **Wikipedia Event Action Plan** | |
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| **Form of engagement** |  |
| **Goal of engagement** |  |
| **Intended audience(s) & size** |  |

If your Wikipedia engagement will take the form of an event or class, whether one time or ongoing, use this worksheet to lay out the step-by-step plan for greater assurance of success. This builds on your responses to the elements of the *Steps to* *Engagement Template*, where you have articulated your goals, institutional support, potential partners and more as the foundation for your engagement.

Watch the [Edit-a-thon online training series](https://outreachdashboard.wmflabs.org/training/editathons) of three modules to get a solid overview of all the factors that combine to deliver a successful editing event. Many of the suggestions could also be applicable to staff training or patron information literacy classes.

**Action components**

To address the range of things that need to fall into place for a group event, this action plan is divided into several components. Note that the components are not necessarily sequential; there may be pieces of multiple components being juggled at any one time. If it’s a complex event plan, assigning different people to focus on specific pieces may help advance the plan smoothly. You may not need all the components for the type of event you’re planning⎯focus on what’s pertinent for you.

* *Before the event: Content and Structure* – develop the content for the class or editing event; determine the structure for delivering the content
* *Before the event: Location and Timing* – determine the location and timing of the event suitable to your chosen format, the intended audience and the number of expected attendees
* *Before the event: Communications* – formulate messaging at all levels, including securing buy-in from administrators and learners and identifying the best channels for communicating the messages
* *Before the event: Materials and Technology Logistics* – as the event approaches, prepare learner materials and technology setup, [prepare for a few “common technical challenges” that arise at Wikipedia events](https://outreachdashboard.wmflabs.org/training/editathons/planning-leading-up-to-the-event/common-technical-challenges) and establish how you will avoid them
* *During the event: Learning Environment* – set up the environment for a welcoming atmosphere, physical comfort, good tech support, refreshments if possible, and family-friendly programming to expand access to individuals with dependents
* *Evaluation* – determine and deploy assessment and tracking tools to help gauge the effectiveness of the event

For each component, fill in the information:

* Action – these are the steps to take from beginning to end of the event or class.
* Details/Resources – for each step of the plan, specify the details of that step and the resources needed to advance the plan.
* Who can help? – identify others who can support you in a variety of ways; look both within and outside your library.
* Date – specify by when this action should be completed; setting target dates can help reveal dependencies for what needs to happen before other steps can be completed.
* Status – is the action not started, in progress or completed?

| **Action** | **Details/Resources** | **Who can help?** | **Date** | **Status** |
| --- | --- | --- | --- | --- |
| **Before the Event: Content and Structure** | | | | |
| Identify and develop the content for the engagement   * *What will be most relevant to the target audience?* * *Identify a theme for the event to appeal to the audience and encourage participation* * *What are the learning objectives?* * *What participant interactions will be included?* |  |  |  |  |
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| Determine the structure and format of the content   * *Will it be delivered online, in person, blended or other?* * *Will it be one time or ongoing?* * *Break the content into digestible chunks for learners* |  |  |  |  |
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| Prepare learning materials   * *Prepare PowerPoint slides, if applicable* * *Provide handouts or links to tutorials for topics needing greater detail* * *Pre-select articles to edit or citation lists to save the time of the learners* * *Prepare materials for interactivity with learners* |  |  |  |  |
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| **Before the Event: Location and Timing** | | | | | |
| Identify optimal dates and times   * *Consider what might work best for your audience; e.g. evenings for working adults* * *Consider staff and partners’ schedules* * *Consider ways you can expand access and inclusivity to adults with disabilities, lack of mobility, or dependents (e.g. offer childcare or children’s programming, travel off-site etc.)* |  |  |  |  | |
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| Secure the location for the event   * *For in-person, what locations are available?* * *Determine the appropriate size of space for the expected attendance* * *Determine the number of computers needed, i.e., BYOD, one computer or internet-connected device per attendee, pairs or groups per computer; provide adequate power strips* * *Ensure that the location has wifi strong enough to support the number of participants* * *Do you need a projector and screen?* * *For online, determine the platform(s) needed* |  |  |  |  | |
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| Confirm dates and add to calendar   * *What is the process for adding to the public and internal calendars?* |  |  |  |  | |
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| Set up registration, if applicable   * *Determine the registration process; e.g. when to open/close, confirmation notices, cancellation policy* * *Determine attendance limits, pre-requisites, age limits, etc.* * *Provide instructions on creating a Wikipedia account and collect Wikipedia usernames in the advance registration form* |  |  |  |  | |
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| Open and collect registrations in conjunction with event communication   * *Send confirmation notices to registrants* * *Provide directions to event* * *Provide information for testing online platform* |  |  |  |  | |

| **Action** | **Details/Resources** | **Who can help?** | **Date** | **Status** |
| --- | --- | --- | --- | --- |
| **Before the Event: Communications** | | | | | |
| Secure buy-in and support from supervisors and staff   * *Articulate how the engagement aligns with library’s mission and strategic plan and how it benefits individual stakeholders* * *Craft talking points tailored to persuade each person* * *Coordinate and share image files of institutional logos for affiliated sponsors and partners* |  |  |  |  | |
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| Communicate to organizers and partners   * *Schedule planning meetings* * *Provide shared planning opportunities; e.g. Google docs, dropbox* * *Maintain regular communications, keeping everyone in the loop* |  |  |  |  | |
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| Craft messages to promote the event   * *Clearly identify the key theme and goal of the event* * *Determine what will appeal to the target audience* * *Articulate what’s in it for them or their institutions* * *Clarify the expectations for attendees* * *Provide directions and transportation information* |  |  |  |  | |
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| Identify channels of communication   * *Consider which promotion channels will reach each intended audience* |  |  |  |  | |
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| Broadcast event announcement   * *Determine the frequency of broadcasts for each channel* * *Consistently thank and/or recognize affiliated sponsors and partners in external messaging* * *Send press releases to local news or media channels for visibility and to bolster participation* |  |  |  |  | |
| **Before the event: Materials and Technology Logistics** | | | | | |
| Identify and assemble materials   * *Print handouts or send links to online resources* * *Assemble supplies for interactivity; e.g. flip charts, post-its, markers, etc.* * *Print name tags in advance or provide blank tags for attendees* |  |  |  |  | |
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| Prepare the technical setup specific to a Wikipedia editing event   * *Have participants create their Wikipedia user names 4+ days before the event (a maximum of six accounts can be created from one IP address within a 24-hour period; additional accounts will be blocked)* * *Set up an Outreach Dashboard program page prior to your event or class with registered Wikipedia usernames in order to assign articles to edit and to track accomplishments* | * *Refer to* [How to run an edit-a-thon](https://en.wikipedia.org/wiki/Wikipedia:How_to_run_an_edit-a-thon) *for suggested flow of actions* |  |  |  | |
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| Set up the room or learning space   * *Arrange the seating and lay out supplies, if in person* * *Provide wheelchair accessibility, if possible* * *Set up the technology for in-person or virtual space* * *Consider online accessibility, i.e., closed captioning for audio* |  |  |  |  | |
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| **Action** | **Details/Resources** | **Who can help?** | **Date** | **Status** |
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| **During the Event: Learning Environment** | | | | |
| Make the space comfortable and welcoming   * *For in-person events:*    + *Obtain snacks, refreshments*   + *Adjust lighting and temperature, if possible* * *For online events:*   + *Provide pre-session orientation to the platform*   + *Add visual elements to slides, minimize text and bullet points*   + *Provide opportunity for virtual attendees to chat with each other* |  |  |  |  | |
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| Provide additional tech and informational support   * *Identify participants with more Wikipedia experience to help newcomers to Wikipedia* * *Invite local Wikipedians or connect with Wikipedians online to provide additional support or guidance to new learners* * *Have learners “buddy up” in pairs to work together to learn, accomplish tasks, or troubleshoot problems* |  |  |  |  |
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| **Action** | **Details/Resources** | **Who can help?** | **Date** | **Status** |
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| **Evaluation** | | | | |
| Determine the indicators to measure success of the event   * *Quantitative: e.g. # of edits, # of people involved* * *Qualitative: e.g. change in perceptions, sense of achievement* * *Other measures?* |  |  |  |  |
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| Determine the instruments for collecting data   * *E.g. surveys, feedback forms, Wikimedia Foundation outreach dashboard, individual or group debrief, etc.* |  |  |  |  |
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| Determine the timing of data collection   * *A pre-assessment to establish a baseline of learner knowledge will need to occur before the event* * *Will there be ongoing collection of data, e.g. cumulative edits over time?* |  |  |  |  |
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| Deploy instrument(s) and collect data   * *Clarify intent and data collection objectives to learners* * *Determine and communicate level of anonymity of data* |  |  |  |  |
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| Analyze data and share results   * *Determine with whom to share data and results* * *Determine best format for sharing with each audience* * *Summarize lessons learned and best practices* |  |  |  |  |
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