

# ATLAS II



8/20/2014

## Planning, execution and lessons learned

This document presents the lessons learned from the planning and execution of the ATLAS II event held as part of the 50th ICANN meeting in London between 21-26 June 2014. Its main purpose is to help future ATLAS coordinators in organizing a similar event. There are lessons learned and recommendations to improve the process and avoid having to “reinvent the wheel”.

# ATLAS II

## PLANNING, EXECUTION AND LESSONS LEARNED

### INTRODUCTION

The 2nd At-Large Summit (ATLAS II) was a successful event. Approximately one hundred and fifty (150) At-Large Structures (“ALSes”) from five Regional At-Large Organizations (“RALOs”) representing ICANN’s global At-Large Community were able to travel to London and participate. Olivier Crepin-Leblond, current At-Large Advisory Committee (ALAC), and myself, current ALAC representative from the North American RALO, were co-chairs responsible for the organization and execution of the event. We were fortunate to have the help of many other people which included members of the ICANN staff and ALSes volunteers.

In this document I am sharing the ideas and expectation that I had in architecting the planning and execution of the summit. I have also identified lessons learned and recommendations on how to avoid what did not work as expected. Make sure to browse through other group reports for I am sure that there are many more lessons learned identified there.

It took the approximately two years from inception to execution and many hours of conference calls, face-to-face meetings and email communications to make ATLAS II a reality. So, if you take upon yourself to coordinate such an event make sure that you will be there the whole time, are consistent and inclusive of all parties involved.

This document does not cover the preliminary work that was done to obtain the budget from ICANN to support the event.

### PLANNING & EXECUTION

Planning, planning and more planning is the thing to do. If you are organizing this please take your time to do a thorough plan and when you are done, do it again.

**RECOMMENDATION #1 : Consult frequently with other collaborators to make sure that the event planning is on the right track.**

1] You need an ATLAS charter document

**RECOMMENDATION # 2 : Create an ATLAS charter document even before starting to plan. The charter, as a minimum, should clearly define the purpose and scope of the summit. This document should be used to support budget requests and explain to external parties what the event is all about.**

2] Understand the purpose of the event and use it to start developing a draft plan.

**RECOMMENDATION # 3 : Create an ATLAS plan. It should include as a minimum: a complete timeline with major milestones and a group charter<sup>1</sup> (see [3] below) explaining in details its responsibilities, scope and expected deliverables.**

3] Create an organizing group framework (i.e. group charter as mentioned in [2] above). This basically is an “**organizational chart**” showing the interrelations and responsibilities of the different groups that need to be created in order to divide the effort in manageable scoped efforts. Ensuring that each team member’s role and responsibilities are clearly stated and understood is a must.

**RECOMMENDATION # 4 : Create the ATLAS organizing group as follows: Core, Survey, Events, Sponsors, Logistics, Communications, and Post Event. Use a graphical representation of the structure for easy reading and understanding.**

**RECOMMENDATION # 5 : Use the WIKI to record everything related to the summit. Organize the pages in such a way that it reflects the group charter structure and flow of information. For example, Action Items for the CORE group in ONLY one place<sup>2</sup>, meetings located within their corresponding group, etc. Keep an eye on the WIKI since, being a collaborator tool, can get messy really fast. Useful information will be hard to find if this happens.**

---

<sup>1</sup> See an example of the ATLAS II group charter here: <https://community.icann.org/display/atlarge/ATLAS+II+Charter>

<sup>2</sup> The same should be done for other groups

**LESSON LEARNED:** Even though there were many volunteers that joined the various groups, only a hand-full of them did the actual work and actively participated. This created frustration among the group leaders and some of the volunteers, which were initially motivated, but lost interest by not having an understating of what was required from them.

**RECOMMENDATION #6:** Identify group specific tasks before making a call for volunteers. Make sure each of these tasks are well defined in its scope and expected results. Once this is clearly defined, multiply those by three and that will give you the max number of volunteers that you need in the group. Then make the call for volunteers and assign each individual task to one or more volunteers up to a maximum of three per task. Make all volunteers responsible for executing their assigned task. Ask them to select a rapporteur for reporting progress back to the main group. Having a bunch of willing people with nothing real to do is frustrating for everyone. (Refer to my recommendation about using Action Items later on)

**LESSON LEARNED:** All groups (and sub-groups) were created from scratch. This resulted in a lot of overlap, with respect to people and efforts, with other ALAC standing working groups.

**RECOMMENDATION #7:** Check currently standing ALAC groups to see if they can take over some of the groups responsibilities identified for ATLAS, leveraging their experience and synergies.

The Organizing Group established for ATLAS II and their responsibilities, working parameters and expected outcome were:

- A. ORGANIZING COMMITTEE<sup>3</sup>:** responsible for overseeing the whole event organization. All group chairs participated in this group as well.
  - a. Working parameters: Overall summit timeline and milestones were discussed and managed at this level. Major action items list was created and continuously updated.
  - b. Outcome: timeline updates and a list of major action items. Action items were used to develop the meeting agenda

<sup>3</sup> This group is called the “Core” group in recommendation #4

**RECOMMENDATION # 8 :** Create a table of major action items. Assign a person to be the owner of the action item for reporting. Each row in the table should have as a minimum a description of the item, due date, responsible person, if it's open or closed and the latest status report. A history of status reports should be maintained for each item to measure progress. Use the action items table to create meeting agendas. This recommendation should be followed by ALL groups.

**LESSON LEARNED :** Even though the Organizing Committee group was led by the concept of co-chairs and worked very well that was not the case with the majority of the groups. It created confusion as to who was the group main point of contact and as a result there were many miscommunication instances and in most of the cases it ended-up having only one of the co-chairs active in leading the group.

**RECOMMENDATION # 9 :** Do not use the concept of co-chairs in any of the groups. Each group should have a single Chair and any number of vice-chairs to help with specific tasks. Responsibilities for the group chair and vice-chairs should be clearly stated and accepted by consensus by each individual group.

- B. SURVEY:** responsible for putting together a survey to determine the global and regional issues within the At-Large Structures (ALSes), as well as capacity building needs. This group was also responsible for designing, in conjunction with the Post Event group, a feedback form to capture summit impressions from attending ALSes.
  - a. Working parameters: Answering the survey was mandatory for those ALSes interested in participating.
  - b. Outcome: a list of major topics and issues to be discussed during plenary conferences, workshops and Regional General Assemblies (RGAs) to help drive the event schedule and its content.

**RECOMMENDATION # 10 :** Create surveys well ahead of time and distribute them according to the main timeline. These include as a minimum: a survey to determine the global and regional issues within the At-Large Structures (ALSes) , a survey to determine capacity building needs and another to get a post event feedback.

- C. EVENTS:** responsible for assembling ALL summit events and their specific schedule.
  - a. Working parameters: The program included the schedule of all events.

- b. **Outcome:** a schedule of all summit activities that helped drive sponsor engagement and some of the logistics necessary to support it.

**RECOMMENDATION # 11 : Make sure that as a minimum the following events are included in ATLAS: Plenary, Networking<sup>4</sup>, Capacity Building, Thematic and Mentoring Program.**

**LESSON LEARNED : The thematic group event coordination started late and too close to the summit. This event is the most important within ATLAS. The lateness in starting this coordination required an epic effort to identifying theme experts, moderators and rapporteurs for each thematic group. This extra effort can be prevented if this is done early in the game.**

**RECOMMENDATION # 12 : Start the Thematic group event coordination well ahead of time**

**RECOMMENDATION # 13 : Subdivide the EVENTS group into sub-groups to distribute the coordination effort for all the events.**

- D. SPONSORS:** responsible for setting a dollar amount objective and actively pursue sponsors to reach it.
- a. **Outcome:** a list of all sponsors and pledged money.

**RECOMMENDATION # 14 : Create an engagement template presentation to be used as a tool to explain the event and its benefits to possible sponsors.**

**RECOMMENDATION # 15 : Identifying and contacting sponsors should start as soon as the CORE group is in place. This will enable sponsors to budget money within their internal budget cycle.**

---

<sup>4</sup> This event was called in ATLAS II the “Fayre of Opportunities”

- E. **LOGISTICS:** responsible for coordinating all summit logistics such as keeping track of all attending ALSes, hotel, travel, conference rooms, interpretation services, remote connectivity, printed material, mailing lists, Wikis, invoicing and summit budget.
  - a. **Outcome:** event support and coordination with all WGs

**RECOMMENDATION #16: Staff should lead this group since most of the logistics coordination is done within ICANN itself.**

- F. **PUBLIC RELATIONS<sup>5</sup>:** responsible for coordinating with ICANN staff all media tours, press kits, in-house promotion, welcome kits and pre-recording of lead figures around ICANN in support of the summit effort. It was also responsible for the coordination of all social media and communications channels such as newsletters and a summit web site. This team also coordinated the recording and dissemination of testimonials during and after the meeting.
  - a. **Outcome:** a planned and synchronized coordination of all communication content through identified dissemination channels

**LESSON LEARNED: This group was divided into various sub-groups for ATLAS II. The tasks assigned to these sub-groups overlapped and created lots of duplicated effort and misunderstandings. These overlaps occurred because of the nature of communications which most of the time requires synchronous interaction between all parts.**

**RECOMMENDATION #17: Do not subdivide this group.**

- G. **ROI<sup>6</sup>:** responsible for obtaining inputs from all working groups to identify tangible and visible returns for the amount of money and effort that will be invested in the summit.
  - a. **Outcome (in progress):** post-summit report including tangible and visible returns, lessons learned and a next steps road map plan to open up new opportunities for At-Large.

**RECOMMENDATION #18: Create this group from the beginning even though their main activities will be happening after the summit.**

---

<sup>5</sup> This group is called the “Communications” group in recommendation #4  
<sup>6</sup> This group is called the “Post Event” group in recommendation #4

## Final Remarks

You know if the planning has been done properly if two weeks before the event all major action items have been closed or at a 95% mark. Execution of a well-planned event should run smoothly. In ATLAS II that was the case.

I would like to thank all the volunteers that helped in putting together this event, especially all the chairs and co-chairs that gave the extra-mile. Also, I would like to thank ICANN At-Large staff and staff from other departments within ICANN for providing their dedication, support and direction needed to make this happen.

**RECOMMENDATION #19: Make sure to include staff in everything related to the organizing and executing the summit (i.e. from begging to end). They are one of the keystones in the whole process.**

**RECOMMENDATION #20: Make sure you take time to organize a mini-event to recognize and appreciate the volunteers and staff members as they are the ones making the ATLAS summit possible.**

Eduardo Díaz  
ATLAS II Co-Chair  
@ 20/8/14