

## Section 2: Workshop Administration

Workshop administration is best undertaken by personnel skilled in the administration of seminars and conferences. Responsibility for workshop administration is assigned by the Steering Group (see Task 1.7).

All the tasks listed in the Summary below should be completed; *however*, not all of them are described in this section because they are general to the organisation of any workshop and do not require explanation in terms of HIA.

### Summary of Tasks for Workshop Administration

- ◆ Booking the venue ~ Task 2.1
- ◆ Confirming the date and time of workshop
- ◆ Making arrangements for catering (according to needs)
- ◆ Making arrangements for as crèche/childcare as relevant
- ◆ Compiling the invitation list with contact details from the stakeholders' list prepared by Steering Group (refer to Task 1.4)
- ◆ Preparing the letter of invitation ~ Task 2.2
- ◆ Sending the invitation to stakeholders
- ◆ Securing the participation of key personnel for the workshop ~ Task 2.3
- ◆ Targeting key informants (as designated by Steering Group) who are non-responders (refer to Task 1.7)
- ◆ Compiling a list of participants ~ Task 2.4
- ◆ Preparing the agenda ~ Task 2.5
- ◆ Collating the information for participants ~ Task 2.6
- ◆ Collating the information for small group facilitators ~ Task 2.7

A Summary Table for Section 2 lists the inputs needed to complete each task, and the destination for, or use of, outputs from each task.

***On completion of the first 5 tasks listed in the Summary of Tasks above, including Tasks 2.1 and 2.2:*** the letter of invitation will be ready for circulation to stakeholders BUT it must be accompanied by the background information/resume on HIA being prepared by the assessor(s) (refer to Task 3.1 A or B)

***On completion of Tasks 2.3-2.7:*** the information needed to undertake the HIA should be ready for circulation to participants and to small group facilitators; however, the successful completion of Tasks 2.6 and 2.7 is dependent on personnel responsible for information preparation fulfilling their tasks according to schedule

**Summary Table for Section 2: Inputs needed to complete each task, and the use of outputs from each task**

<b>Inputs needed to complete task</b>	<b>Task</b>	<b>Destination for/use of outputs from task</b>
<i>From Steering Group:</i> outputs from Task 1.6	<b>2.1</b>	For completion of Tasks 2.2 (letter of invitation) and 2.3 (securing participation of key informants)
Output from Task 2.1; <i>from Steering Group:</i> output from Tasks 1.1 and 1.2; <i>from assessor(s):</i> output from Task 3.1 A or B	<b>2.2</b>	All stakeholders, including decision-makers; Steering Group; all personnel involved in the workshop
<i>From Steering Group:</i> outputs from Tasks 1.6 and 1.9; outputs from Task 2.1	<b>2.3</b>	For completion of Tasks 2.6 and 2.7 (mailing to participants, and to small group facilitators)
Responses from stakeholders to invitation, and key informants to follow-up	<b>2.4</b>	Assessor(s) for completion of Task 4.1; <i>for notification:</i> all participants
<i>From Steering Group:</i> output from Task 1.10	<b>2.5</b>	For completion of Tasks 2.6 and 2.7 (mailing to participants, and to small group facilitators)
<i>From Steering Group:</i> memorandum of notification detailing outputs from Task 1.8; <i>from personnel responsible for information preparation, including assessor(s):</i> outputs from Tasks 3.2-3.7; <i>from assessor(s):</i> outputs from Task 4.1	<b>2.6</b>	Circulation of information to all participants
<i>From Steering Group:</i> memorandum of notification detailing outputs from Task 1.8; <i>from personnel responsible for information preparation, including assessor(s):</i> outputs from Tasks 3.2-3.7; <i>from assessor(s):</i> outputs from Tasks 4.1-4.6	<b>2.7</b>	Circulation of information to small group facilitators

## **Task 2.1: Booking the venue**

<b><i>What</i></b>	Booking the venue, and thereby securing the date and time of the workshop, should be the first task of those assigned responsibility for workshop administration because several of the other tasks are dependent on having this key information confirmed.
<b><i>When</i></b>	Booking the venue should be undertaken immediately upon receiving notification from the Steering Group of the need to organise a participatory stakeholder workshop on a particular proposal.
<b><i>Who</i></b>	The workshop administrator(s) is responsible for booking the venue.
<b><i>How</i></b>	<p>When selecting the venue, it is advisable to consider the following:</p> <ul style="list-style-type: none"><li>• Will it hold the number of people you expect to attend, bearing in mind the plenary sessions?</li><li>• Is there enough space for participants to work in small groups?</li><li>• Are the catering facilities appropriate to the type of refreshments you wish to provide?</li><li>• If members of the community are invited, are there facilities to run a crèche/provide childcare?</li></ul>
<b><i>Advice</i></b>	If you do not have first-hand experience of the venue, visit before you book to make sure it is suitable for your needs. It is advisable to book a pleasant venue, particularly one that has a source of natural light - it can make a noticeable difference to the atmosphere during the workshop.
<b><i>Tip</i></b>	Notwithstanding any constraints on the budget, it does help if you can provide refreshments for participants. In order to attend the workshop, people will have to give up more than 3 hours of their time (including travel there and back). Therefore, it is best to provide food, e.g. sandwiches or finger buffet, before or after the workshop whichever is appropriate given the timing of the workshop.

## Task 2.2: Preparing the letter of invitation

<b>What</b>	<p>The <i>invitation</i> to stakeholders should contain the following information:</p> <ul style="list-style-type: none"><li>• notice of the intention to conduct an HIA on a particular proposal by means of a participatory stakeholder workshop</li><li>• aims of the HIA</li><li>• a list of any background information enclosed</li><li>• date, time and venue for the workshop</li><li>• reply slip, including:<ul style="list-style-type: none"><li>- date by which a response is required</li><li>- participant's specific needs, e.g. for diet, access, or childcare</li><li>- participant's previous experience of HIA/rapid appraisal (optional)</li><li>- named contact responsible for queries about the workshop</li></ul></li></ul>
<b>Enclosures</b>	<p>The letter of invitation to stakeholders may be accompanied by either a brief introduction to HIA (see Task 3.1A) or a resume of the HIA process locally (see Task 3.1B), as decided by the Steering Group.</p>
<b>When</b>	<p>The letter of invitation can be prepared after the venue, date, and time for the workshop have been confirmed, but cannot be sent out until the background information for enclosure has been received from the assessor(s).</p>
<b>Who</b>	<p>The workshop administrator(s) is responsible for preparing the letter of invitation.</p>

## Task 2.3: Securing the participation of key personnel for the workshop

<b>Why</b>	<p>Once the venue, date, and time for the workshop have been confirmed, it is vital to ensure that the people assigned responsibility for leading the workshop are available, and can undertake the roles they have provisionally been assigned.</p>
<b>What</b>	<p>It is necessary to confirm arrangements with the following people:</p> <ul style="list-style-type: none"><li>• main workshop facilitator</li><li>• main workshop scribe</li><li>• main workshop observer</li><li>• chairperson for the workshop</li><li>• personnel responsible for giving presentations at the workshop, e.g. proposal developer and information management personnel</li></ul> <p>It is also important to contact the people who have been suggested as small group facilitators to ascertain their willingness to undertake this role. If they are willing to be involved, explain that arrangements for running the small workgroups and detailed instructions about the tasks will be sent to them when all participants for the workshop have been confirmed.</p>
<b>When</b>	<p>Securing the participation of key personnel for the workshop should be done immediately after the venue, date, and time for the workshop have been confirmed.</p>
<b>Who</b>	<p>The workshop administrator(s) is responsible for securing the participation of key personnel for the workshop.</p>

## **Task 2.4: Compiling a list of participants**

- Why** Compiling a list of participants is vital because the assessor(s) needs to prepare information for the small group facilitators partly on the basis of the knowledge and experience of participants.  
It is also useful to give each participant a list of all participants attending the workshop.
- What** The list of participants should include the following details:
- participant's name
  - participant's organisation or affiliation
  - if possible, indication of whether a participant has attended previous local HIAs
- When** Compiling a list of participants should be done as soon as stakeholders have responded, and key informants have been targeted (refer to Task 1.4, 'Learning point').
- Who** The workshop administrator(s) is responsible for compiling a list of participants.
- How** The list of participants needs to be collated from responses to the invitation and the results of targeting any key informants who have not responded. It is helpful to the assessor(s) if the workshop administrator can indicate whether participants have been involved in other HIAs that have been conducted locally. This can be accomplished in one, or both, of the following ways:
- by keeping a record of the involvement of personnel from various agencies/affiliations each time an HIA is conducted locally - these records can be referred to each time a new HIA is to be undertaken
  - by eliciting this information on the reply slip on the letter of invitation (see Task 2.2)
- If possible, names of small group facilitators should be given as a subset on the list of participants.

## **Task 2.5: Preparing the agenda**

**Why** Providing an agenda beforehand will give participants an idea of the structure of the workshop, and their role within it. The agenda will also give an indication of the anticipated outputs from the workshop, which were initially signalled in the aims for the HIA sent out with the invitation to attend.

**What** The agenda should include the following information:

- date, time, and venue for the workshop;
- the amount of time scheduled for all items on the agenda, including talks, tasks, and any refreshment breaks;
- for talks, the name of the presenter;
- for all tasks, a brief outline of what the task involves and the arrangements for doing the task (e.g. brainstorm in plenary, work in small groups);
- for feedback sessions, the name of the facilitator.

Suggestions for the basic structure for the workshop are presented in Table 1.5, including time allocations for each talk and task. If a ‘carousel’ approach has been chosen by the Steering Group, suggestions for the structure of the workshop are shown in Table 1.6.

**When** Preparing the agenda should be done when key personnel involved in leading the workshop have confirmed their participation.

**Who** The workshop administrator(s) is responsible for preparing the agenda.

## **Task 2.6: Collating the information for participants**

<b>Why</b>	As the information for circulation to participants will be prepared by various personnel, and needs to be collated before it can be sent out.
<b>What</b>	<p>It is necessary to compose a covering letter to accompany the collated documents. The covering letter to participants should contain the following details:</p> <ul style="list-style-type: none"><li>• date, time, and venue for the HIA;</li><li>• a named contact responsible for organising the workshop;</li><li>• notification of the aspects or elements of the proposal to be assessed during the workshop;</li><li>• a listing, and brief explanation, of the documents enclosed;</li><li>• notification of the small group to which the participant has been allocated for the workshop, including the name and affiliation of the small group facilitator if possible (see Task 4.1).</li></ul>
<b>Enclosures</b>	See Box 2.1.
<b>When</b>	It is advisable to collate the information for mailing to participants at least 2 weeks before the workshop is scheduled to take place to give participants sufficient time to read and assimilate it. However, this task cannot be completed until all those responsible for information preparation have finished their tasks (Tasks 3.2-3.7).
<b>Who</b>	The workshop administrator(s) is responsible for collating the information for participants.
<b>How</b>	<p>To accomplish this task it is necessary for the workshop administrator to liaise with the various personnel responsible for preparing the information for participants, which includes the assessor(s). The memorandum of notification from the Steering Group should include details of who is responsible for preparing the various items of information. The assessor(s) should also provide details of the small workgroups to which participants have been allocated (see Task 4.1).</p> <p>If information for the workshop has not been prepared according to the schedule laid out by the Steering Group, it could have implications for the quality of the outputs from the workshop. In this situation, the workshop administrator should refer to the chairperson of the Steering Group for advice and support.</p> <p>Once the information has been collated, it must be sent to participants as soon as possible; if there has been a delay in information preparation for whatever reason, consider sending the mailing first class.</p>
<b>Advice</b>	It is vital to emphasise in the covering letter the need for participants to read the information prepared for the workshop, particularly the proposal documentation, before attending the workshop. This will save time during the workshop because participants will be conversant with the proposal, and therefore in a better position to appraise it.

**Box 2.1: Information to be collated and sent to participants**

- the agenda
- the profile of the community or population affected by the proposal's implementation
- the vulnerable, marginalised or disadvantaged groups in that community or population
- summary of local environmental conditions, as appropriate
- summary of the evidence base relevant to the proposal
- summary of the experience base relating to the proposal

## **Task 2.7: Collating the information for small group facilitators**

- What** The bulk of the information for circulation to small group facilitators will be the same as that for participants; however, there will also be some important supporting materials, mainly relating to the core workshop tasks, to circulate.
- It is also necessary to compose a covering letter to accompany the collated documents, which should contain the following details:
- date, time, and venue for the HIA
  - a named contact responsible for organising the workshop
  - the name of the assessor(s) in case of queries
  - notification of the aspects or elements of the proposal to be assessed during the workshop
  - notification of the specific aspects or elements of the proposal that the facilitator's small group will be appraising
  - a listing, and brief explanation, of the documents enclosed
  - an explanation of the supporting materials prepared for small group facilitators to lead the core workshop tasks during the appraisal
- Enclosures** See Box 2.2.
- When** It is advisable to collate the information and supporting materials for mailing to small group facilitators at least 2 weeks before the workshop takes place in order to give facilitators sufficient time to read the information, and to examine the supporting materials. However, this task cannot be completed until all those responsible for information preparation have finished their tasks (Tasks 3.2-3.7), and the assessor(s) has finished the preparations for the core workshop tasks (Tasks 4.1-4.6).
- Who** The workshop administrator(s) is responsible for collating the information for small group facilitators.
- How** To accomplish this task it is necessary for the workshop administrator to liaise not only with the various personnel responsible for preparing the information for participants, but also with the assessor(s) who is responsible for preparing the supporting materials for small group facilitators. The memorandum of notification from the Steering Group should include details of who is responsible for preparing the various items of information.
- If the supporting materials for small group facilitators is not prepared according to the schedule laid out by the Steering Group, this will have implications for the quality of the outputs from the workshop. In this situation, the workshop administrator should refer to the chairperson of the Steering Group for advice and support.
- Once the information and supporting materials for small group facilitators have been collated, it must be sent to them as soon as possible; if there has been a delay in preparing the supporting materials for whatever reason, consider sending the mailing first class.
- Advice** It is vital to emphasise in the covering letter the need for facilitators to be conversant with the aspects or elements of the proposal that have been allocated to their small group for appraisal. It is also recommended that the facilitators familiarise themselves with:
- the tailored version of the tool (see Task 4.4) marked up to show the determinants of health it is a priority for their small group to address in relation to the aspects or elements of the proposal for which they are responsible;

- the schedule of questions to be used during the core workshop tasks (see Task 4.5).

**Box 2.2: Information, and supporting materials, to be collated and sent to small group facilitators**

***Information***

- the agenda
- the profile of the community or population affected by the proposal's implementation
- the vulnerable, marginalised or disadvantaged groups in that community or population
- summary of local environmental conditions, as appropriate
- summary of the evidence base relevant to the proposal
- summary of the experience base relating to the proposal

***Supporting materials***

- list of instructions
- the tool/list of determinants of health tailored for each small workgroup
- schedule of questions for core workshop tasks
- names and affiliations of participants in small workgroup for which facilitator is responsible