



IDDS Operations Worksheet

Organizer Roles

Overview

You've already drafted this before, but now we need to know who will be doing what and plan for which roles you need to advertise.

IDDS Organizer Roles Chart

Unlike most organizations, the IDDS organizing structure is very flat and collaborative. Nevertheless, there are four key components of any IDDS organizing team must be aware of for a successful summit - the curriculum and learning, the engagement we have with communities, the experience participants have, and the operations to make all of the pieces possible. Though there are a few key leaders (such as the experience coordinator, the lead instructor, and the lead organizer who is the heartbeat of it all), it is important to note how interrelated each of the roles and functions are. Likewise, it is important to note that, though an organizer may be assigned to a particular role, the IDDS organizers work together as a team - helping out where needed, even if it is not in their specific description.



Relation of the IDIN Summits Coordinator to summit organizing teams: To oversee, connect, and support lead organizers with each other and other resources for the successful implementation of each summit.

Leadership Roles

- Lead Organizer
- Lead Instructor
- Co-Lead Instructor
- Lead Accountant ~
- Experience Coordinator*

Other Important Organizer Roles and Functions

- Communications Organizer
- Community Liaisons ~
- Participant Support Organizer*
- Translation Coordinator ~
- Health and Safety Organizer ~
- Housing and Meals Organizer ~
- Sr. Design Facilitators
- Design Facilitator
- Cross-Cultural Facilitator ~
- Special Guest
- Transportation Organizer ~
- Procurement Organizer ~
- Workshop, Tools, and Spaces Organizer ~
- ICT Organizer ~

*Must have attended an IDDS before as a participant or an organizer.

~ Must know the local context, culture and language.

Leadership Roles

The IDIN Summits Coordinator will guide and provide support for the Lead Organizer who will work closely with the *Lead Instructor, Experience Coordinator, and Lead Accountant*. While there will be many organizers who will provide an invaluable amount of time volunteering to bring IDDS to fruition, the amount of time required from each of the leads will be much higher than the average organizer and is highly recommended they incorporate a stipend in the summit budget appropriate to the amount of time and effort they will be dedicating to IDDS.

Lead Organizer

The Lead Organizer is the heartbeat of the summit. S/he is the leader of the entire summit and the person responsible for overseeing the connection of all four components of the summit (the Operations, the Community Engagement, the Curriculum, and the Participant Experience) and is directly responsible for the Community Engagement and Operations components.. But the most

important responsibility of the lead organizer is to align the visions of the organizing team - ensuring everyone is on the same page, that all collaborators (internal and external) buy into the goals of the summit, and that everything is ready for a successful summit.

Similar to the Executive Director of a small non-profit organization, the Lead Organizer is responsible for developing the vision of the summit with the organizing team and leading all the fundraising efforts and operational efforts to ensure the vision can happen. This person is also responsible for arranging and facilitating organizing team meetings, establishing an action plan, making sure tasks are delegated clearly and appropriately and completed in time, and encouraging the team in the IDDS vision.

The Lead Organizer should be someone from the the organizing team who has planned events before, is available for the entire summit, has time and a passion to lead and direct the organizing team prior to and during the summit, is able and willing to serve as the point of contact for their IDDS, enjoys building teams, would enjoy working closely with the IDIN Summits Coordinator, and (most importantly) is past participant who knows the local context, culture, and language where the summit is being held.

Lead Instructor

The Lead Instructor is the person who adds academic credibility to a summit and is responsible for creating and overseeing all of the curriculum and learning. S/he will serve as the lead support and mentor for the other instructors, senior design facilitators, design facilitators, cross-cultural facilitators, and guests, as well as leading the project topic selection process. This person needs to have been to an IDDS before, has experience teaching hands-on design and development curricula in diverse contexts, is an experienced facilitator, and is available to lead the development and delivery of the curriculum in a timely manner. Similar to the other two leading roles, this is a position that requires a large amount of time, clear and timely communication skills, and enthusiasm for IDDS.

Co-Lead Instructor

The Co-Lead Instructor is someone who is an expert in collaborative design and development and an active organizer and deliverer of the summit's curriculum. They are typically someone with strong and relevant academic credentials and/or years of hands-on experience. They do not have to be professional instructors, but must have experience facilitating and leading hands-on lessons and activities with diverse groups of adult learners. Prior to a summit, the co-instructor must be available to work closely with the Lead Instructor and design facilitators to assist with curriculum development as well as scheduling sessions and activities. During the summit, instructors must be present and available for instructing and facilitating sessions. Instructors are also responsible for ensuring all materials are available, ready, and prepared for each session.

Lead Accountant

The Lead Accountant is an official representative of the local organization and fiscal entity that the summit will be working with. He or she has the authority and is also the organizer responsible for all managing the funds before, during, and after the summit. They are responsible for documenting all funds received and all funds spent. They are also responsible for disbursing funds and receipt books to organizers and vendors and collecting receipts from them in a timely manner. This person must have experience with accounting and/or bookkeeping, have excellent attention to

detail, be fluent in the local language and culture, and be quick to respond to requests for expense status updates.

Experience Coordinator

The Experience Coordinator is the person responsible for overseeing the entire participant experience. From application to acceptance to summit participation, they ensure each participant is up to date, informed, and ready to come to the summit. They oversee all functions of communication, participant support, health and safety, housing and meals, and nighttime activities/special events. It is imperative that this person has been to an IDDS before, is full of the IDDS spirit, has great attention to detail, and is available to quickly respond to all emails and inquiries participants may have.

Other Important Organizing Roles

Communications Organizer

This organizer is responsible for all the public relations and communications for the summit. This includes, but is not limited to, creating a pitch for advertising the summit, creating a logo for the summit and approving it with the IDIN Communications Coordinator, creating brochures, banners, and other print materials for the summit geared towards participants, communities, and guests. Most importantly, he or she is responsible for managing all visual communication (photos/videos) and social media platforms for the summit (Facebook, Twitter, Blogs, and videos). While the Communications organizer does not need to create all these pieces themselves, they are responsible for engaging the right volunteers (locally or remotely) and coordinating them in a timely manner. This organizer should have experience in mass communications, enjoy working with other people, and be ready to represent with IDDS spirit at any time.

Community Liaison Organizers (1 per community)

Community Liaisons are organizers who are responsible for preparing communities for participants to visit and work with communities during an IDDS. They are responsible for coordinating and communicating all the details for the home stays, meals, locked workshop spaces as needed, transportation, and setting up community stakeholder meetings. There should be one community liaison for each community IDDS is working with. This volunteer should be from the community (or have strong connections there), able to speak both English and the local language, be well respected in the community, available to help coordinate the logistics, and will work closely with the lead organizer to keep them up-to-date on all on-the-ground logistics.

Participant Supporters (3-4 per summit)

The participant support organizers are responsible for ensuring participants are supported from the beginning of the application process to the closing ceremony of IDDS. Organizers who are working as participant supporters are responsible for answering applicant emails in a timely manner, assisting with the application review process, sending out participant selection and scholarship selection emails and calls, coordinating the buddy system with all the summit organizers, assisting participants with fundraising, visa processes, and travel to the summit, and

pairing roommates. During the summit, they play a key role in adding to the personal touch of the summit - assisting with airport pick-ups, preparing the rooms and spaces, and coordinating nighttime activities and special events (such as any special field trips and the closing ceremony). Participant Supporters should be very approachable and **must** have been IDDS participants before. They must have excellent communication skills, access to internet and international calling, willing to work with several volunteers, willing to answer participant questions, culturally sensitive, and have a passion to share the IDDS spirit. This role will require more time than some of the other roles, but also will be one of the most personally rewarding roles.

Translation Coordinator

This person is responsible for ensuring all documents, advertisements, sessions, and experiences both prior to and during the summit are translated, particularly for a bi-lingual summit. This person is responsible for coordinating all volunteer translators throughout the summit and having a clear schedule organized for the rotation of translators ready prior to the summit. The number of translators needed for a particular summit will vary depending on need and capacity of the summit.

Health and Safety Organizer

The Health and Safety organizer is the person responsible for ensuring the health and safety of participants during the summit. Prior to the summit they are responsible for identifying hospitals and health facilities near the summit venue and in communities. They are also responsible for assisting participants (prior to and during the summit) with health insurance questions, vaccination questions, and serving as the main point of contact in case of emergency. While this person does not have to be a healthcare professional, it is recommended that they have experience working with healthcare professionals. The Health and Safety organizer must be First Aid trained, calm under pressure, and ensure that there is at least one organizer in each community who is First Aid trained. They should also feel comfortable communicating to participants, international organizers, and guests the special health and safety precautions they need to take to stay healthy and safe during the summit in the host country. This organizer must be fluent in the local context, culture, and language and a good communicator.

Senior Design Facilitators (suggested 1 per two projects teams)

Senior Design Facilitators are the organizers who are responsible for guiding participant teams through the design process and the development of their projects. A senior design facilitator will work in tandem with a design facilitator to support 2 project teams before, during, and after a summit. A good senior design facilitator has strong experience and a unique skillset - they are both technically capable (have a background in hands-on design) but are also good facilitators (skilled at navigating diverse group dynamics). Prior to a summit it is expected that the senior design facilitators will work closely with the Lead Instructor and assist with project selection and curriculum development, but also assist participant supporters in recruiting the right participants and assisting them in their arrival to the summit. Senior Design Facilitators will be expected to instruct sessions for their small groups and, at times, for the whole group of IDDS participants. They must have been an IDDS participant before and familiar with the IDDS design methodology. While the senior design facilitator is not expected to know every answer for all participants' technical questions, they must be capable and ready to serve as a resource to connect participant groups with the appropriate field experts and information they need to move forward. Moreover, senior design facilitators are **responsible for ensuring groups complete not only the**

prototype/project, but the proper documentation for their prototypes/projects and communities by the end of the summit. Beyond good design skills, a good senior design facilitator is experienced at guiding groups peacefully through conflict, an excellent communicator, an excellent listener, and full of the IDDS co-creative spirit.

Design Facilitator (suggested 1 per two projects teams)

Design Facilitators are organizers who are new to design facilitation, but demonstrate interest and promise in becoming a senior design facilitator from their strong experience either in design and/or group facilitation skills. Design Facilitators shadow and work closely with senior design facilitators and participants before, during, and after a summit. The roles and responsibilities are the same as that of senior design facilitators (see above).

Cross-Cultural Facilitators (2 per summit)

Cross-Cultural Facilitators are organizers who are from the summit's host country, know the culture and language well, are excellent communicators, and are experienced at working with international guests and orienting them to their home country and culture. They are responsible for orienting participants as well as international organizers and guest on the basics of the culture and context of the host country. The role entails facilitating a few key cross-cultural sessions, but also entails answering any questions participants, international organizers, and/or guests may have regarding the host country context. This role is best filled by two organizers (preferably 1 male and 1 female) per summit.

Special Guests (varies depending on need and capacity of the summit)

Special Guests are unique types of IDDS organizers. Though they are not typically a part of the summit development prior to a summit, they are critical pieces during the summit for participant learning. A special guest could be a guest speaker, guest panelist, or other visiting guest role - anyone the organizing team coordinates to bring in. This does not include IDIN staff as they attend summits at their own expense. A special guest is typically an expert in something relevant for participants to know about - whether technical, cultural, professional, or academic. Special guests are invited by the Lead Instructor and curriculum team at least 6 months prior to the summit. Some special guest require payment and some offer to join on a voluntary basis. It is good to clarify with the special guest upon invitation how and when you will cover the costs of their transport, food, and/or overnight stay (if necessary).

Workshop, Tools, and Spaces Organizer

The Workshop, Tools, and Spaces organizer is responsible for ensuring the spaces are ready for a given summit and that (where needed) there is enough workshop space for project teams and the appropriate tools are available for the time needed. Prior to the summit, they are responsible for acquiring signed commitments from local workshops and collecting the appropriate tools locally and/or through IDIN. During the summit, they are responsible for preparing workshops, training participants on workshop safety, and keeping track the tool inventory and keep tools organized - especially during community visits. At the end of the summit, the Workshop, Tools, and Space Organizer is responsible for packing up tools and ensuring they are returned in good condition to IDIN or the appropriate owner in a timely manner.

Procurement Organizer (1-2 per summit)

The Procurement Organizer is the organizer responsible for shopping for all the items for the summit that have been approved by the Lead Financial Coordinator. Prior to and during the summit the Procurement Organizer will be responsible for acquiring all the materials needed for the summit, keeping receipts of all purchases, storing purchased materials in a safe location, and notifying organizers when particular materials have been acquired. While not all materials need to be purchased (some can be borrowed or found), the ones that are purchased will need to have a receipt turned into the accountant. The Procurement Organizer needs to know the local markets well, speak the local language, enjoy shopping for materials, and have easy access to transportation to respond quickly to shopping requests.

Transportation Organizer (1-2 per summit)

The Transportation Organizer is the person or persons responsible for arranging safe and affordable transportation for all people during the summit. Particularly, they are responsible for informing IDIN central of scholarship flights that need to be purchased, informing participants of arrival transportation information (organizing local transportation for airport and bus station pick-ups and drop-offs to and from the summit venue), organizing transportation for community visits as well as shopping trips, workshop visits, and any other emergency transport. They are responsible for helping to estimate the budget for transportation and confirming transportation with drivers and communicating the transportation plan to the summit participants and organizers in a timely manner. This person must be fluent in the local language and context, have experience coordinating local transport, available to answer questions regarding transport via email or phone before the summit, and available to coordinate transport during the summit.

Housing and Meals Organizer

The Housing and Meals Organizer is the person responsible for ensuring the rooms and meals are ready for the summit (for summits where meals are prepared by the venue). This role requires high level of attention to detail and good negotiation skills. This person will be responsible for keeping track of the number of rooms and meals needed for each day of the summit as well as all the materials (tables, chairs, etc.) needed for each session. It is highly recommended that this is someone who works at the venue; if not, it will require a very patient and communicative full-time local volunteer to ensure all requirements are met.

ICT Organizer

The ICT organizer is responsible for all information communication and technological issues at the summit. They are someone who understands the local ICT context for mobiles, internet access, and printing and can assist with all technical questions and issues that arise. (It may be helpful if they get another friend to help them with the printing and/or have the procurement organizer pick up the printed documents from a printer.) Prior to the summit they will be responsible for communicating with organizers, participants, and guests what the context is like and what they can expect to be provided vs. what they will have to pay for. During the summit they will play a key role assisting with access to mobile communications, internet access (where applicable), printing, and setting up projectors or any other pieces of equipment that may need technical assistance. This person will also be responsible for distributing airtime to organizers, keeping track of IDIN laptops or ipads that are loaned to participant teams, and keeping track of internet modems that may have been purchased during the summit. This organizer does not have to be an ICT professional, but does need to have a strong ICT background, technically skilled, responsible

with expensive equipment, has good communication skills, is aware of the local context, and is available for the entirety of the summit.

Please complete the worksheet below and indicate who will fulfill each role or if you need help to recruit someone from IDIN for that role.

Note: While all organizers will support each other and some roles can be done by the same person, an organizer may not fill more than one leadership role.

*A * indicates the organizer must have attended an IDDS before as a participant or an organizer.*

Leadership Roles

Please complete the boxes below. If there is a role you need to advertise for organizer applications, please write “Advertise this role!” Since these roles are voluntarily, remember for roles that you advertise, make sure that you have enough budget to cover their transport to the summit, their food, housing, and any small incidentals.

Role	Name of Person
Lead Organizer	
Lead Instructor	
Co-Lead Instructor	
Lead Accountant	
Experience Coordinator*	

Other Important Organizer Roles and Functions

Role or Function	Name of Person (s)
Communications Organizer	
Community Liaison Organizers	

(1 per community)	
Participant Support Organizers (3-4 depending on capacity of summit)	
Translation Coordinator (if necessary)	
Health and Safety Organizer	
Senior Design Facilitator (suggested 1 per every 2 projects)	
Design Facilitator (suggested 1 per every 2 projects)	
Cross-Cultural Facilitators (1-2 depending on the summit; preferably 1 male and 1 female)	
Special Guests (varies depending on summit need and capacity)	
Workshop, Tools, and Spaces Organizer	
Procurement Organizer	
Transportation Organizer	
Housing and Meals Organizer	
ICT Organizer	