# **Standard Operating Procedures (SOP) for Bitcoin Educator Unconferences**

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# Introduction

In the spirit of free and open source everything, this document is a reference for anyone inspired to help run or participate in a Bitcoin Educators Unconference.

The idea of “unconference” is not new. Imagine a safe place where like-valued people gather, share ideas, go really deep brainstorming and build their network. Here are some general references for inspiration:

* <http://barcamp.org/w/page/404135/OrganizeALocalBarCamp>
* <https://unconference.net/methods-2/>
* <https://internetidentityworkshop.com/>
* <https://identitywoman.net/>

Another document which may be helpful is the Mi Primer Bitcoin meetup blueprint:

<https://github.com/MyFirstBitcoin/Light-Node-Network/tree/main/OS%20Everything/Meetup%20Blueprint>

# Preparation & First Steps

The following decisions are not intended to be all-inclusive. Rather, these are a guide. They are known subjects that will materially impact how you plan and execute a successful event. Reading them will help you think through what your key areas are for your event.

### **Decision: Timing Alignment with Other Conferences**

This decision will set the direction for the rest of the event planning process. There are so many conferences, each with their own focus and characteristics. It is helpful if you can talk with conference planners you decide are most relevant, e.g., Atlantis for Madeira or Bitcoin Park for Nashville. The 2024 Nashville Unconference was the day before the large BTC Media conference.

Consider smaller conferences, e.g., Adopting Bitcoin or Nostrica, for better alignment of the vibe and audience. Larger conferences may have more people, but they may also have competing events fighting for the same attention and time of the attendees. The 2023 El Salvador Unconference was the day before Adopting Bitcoin.

There is a third option, which is to not time the unconference with any other events.

### **Decision: Event Project Lead** Recruiting a project lead is essential to coordinate actions to plan and execute an effective unconference. See the section on “Roles & Responsibilities”. This will clarify the characteristics best suited to leading the project.

**Decision: MPB-Affiliated or Independent Event**

By definition, unconferences can be coordinated by anyone, on any subject, at any time. You have complete freedom for independent events. However, partnering with MPB has advantages, e.g., sharing lessons learned, sharing brand audiences, and contributing subject matter experts. The stipulation is compliance with the pillars of consensus for the node network:

1. Independent
2. Impartial
3. Community-based
4. Bitcoin only
5. Empowerment over profits
6. Quality

The recommendation is to contact MPB to discuss your event idea.

### **Notice: Mi Primer Bitcoin (MPB) doesn’t take sponsorships**

Taking sponsorships is highly discouraged. Keep in mind that impartiality is a pillar of MPB. It is tempting to accept sponsorships for events, or just for portions of events. The downside is the risk of strings attached, e.g., influencing who speaks, venues, marketing, etc. Sponsors have their own incentives.

Also, it may appear through marketing and/or to attendees that MPB endorses a particular company, brand, or philosophy. This is inconsistent with another MPB pillar, independence.

Donations reduce the risks sponsorship poses to both MPB’s impartiality and independence.

### **Decision: Partnering with MPB Nodes**

Working collaboratively with light or full MPB nodes simplifies the planning and execution of an unconference event. Geographic nodes can assist with cultural norms, scouting venues, coordinating with local vendors, etc. At the 2024 Nashville Unconference, Bitcoin Veterans supported the event. This was extremely helpful in many ways including recruiting volunteers. The lead contact for the veterans was from the MPB thematic node, Operation Bitcoin.

You can find all nodes here:

* Light Nodes: <https://github.com/MyFirstBitcoin/Light-Node-Directory>
* Full Nodes: <https://github.com/MyFirstBitcoin/Full-Node-Directory>

### **Decision: Unconference Ethos versus Profitability**

The ideal state is an event true to the unconference ethos, which is also in the black financially speaking. While planning, it is likely tension will develop between the tradeoff of the mission/values/ethos and breaking even financially. For example, inviting influencers with large audiences may sell more tickets and therefore increase revenue, but this also attracts a different type of audience/following. Reaching out to high signal individuals that you would love to work with, on the other hand, may be more aligned with the unconference ethos but will result in fewer attendees.

This is not a binary decision. You can plan a hybrid schedule with a mix of invited, high-profile speakers and day-of breakout sessions.  
  
Whatever you decide, make it clear before the organization starts planning.

The recommended rule of thumb is: the number of people who attend is the number who should have been there. Maintaining the ethos of the Unconference is what gives it its character, and what makes it stand out from the others, so do not sacrifice this for other factors, even financial.

### **Decision: Branding Policy**

It’s encouraged to keep the Unconference as neutral as possible, so that means that you as an organizer are not there to sell products to the attendees. The same counts for the Branding of the Unconference.

MyFirstBitcoin created a Brand Book which states how the logo, branding and names are allowed and NOT allowed to be used: <https://github.com/MyFirstBitcoin/Brand-Book/>

# 2. Roles & Responsibilities

The intent of this area is to clarify the structure of the team. The earlier this is done, the less frustration the team will experience in the future. It also reduces the risk of misunderstandings of who does what; reduces risk of poor execution, e.g., actions not taken because everyone thought someone else was handling it; reduces risk of in-fighting, e.g., two or more people believe they are in control of a certain area or task.

The project lead sets the planning cadence and recruits the team. Consequently, the following roles are crucial before moving to the next steps; multiple roles can be taken by one person.

### **Executive Director**

* Responsible for approving decisions that are recommended by the team, and also for recruiting other team members, e.g, the local expert or contact person.

### **Event Lead (aka Project Lead)**

* Responsible for leading daily operations. This person should be comfortable building action item lists, conducting planning sessions, assigning tasks and following up proactively.
* The Event/Project Lead and the Executive Director should meet early to clarify responsibilities, e.g., expense approval levels, speaker selection, etc.
* Recommended cadence for planning calls is weekly.

### **Local Lead**

* Responsible for giving team guidance on the customs and culture where the event is being held, finding and screening local vendors and doing reconnaissance, e.g., visiting the venue in person.
* Check out local/nearby Light or Full Nodes for collaborations: <https://github.com/MyFirstBitcoin/Light-Node-Directory/>

### **Tech Lead**

* Responsible for building the website, ticket sale and tech work.
* If this person cannot be in-person at the event, the Event Lead will need to recruit an audio-visual lead.

### **Audio-Visual (AV) Lead**

* Responsible for planning, sourcing and day-of execution of microphones, projectors, cameras, video cameras, lights and any other equipment needed.
* Responsible for bringing options to the team’s attention, e.g., will the event be broadcasted live (which impacts internet access requirements).

### **Marketing/Communications**

* Responsible for authorizing all communications, both on website, socials and outreach.
* Responsible for participating and contributing to planning discussions, e.g., speaker selection. This ensures marketing announcements are as timely as possible.

### **Accounting**

* Responsible for all payments, invoices, refunds, in consultation with the Event Lead.
* Responsible for guiding the team on best practices, budget limitations, accounting processes and regulations. For example, the planning team should understand to copy [expenses@miprimerbitcoin.io](mailto:expenses@miprimerbitcoin.io) when coordinating with MPB Finance, but this is different for very event. Ensure whoever is locking in services to ask for tax exemption. Share the non-profit certification as necessary.

### **MC**

* Responsible for day-of coordination, announcements
* Responsible for facilitating day-of idea pitches.
  + Must generate enough excitement to encourage attendees to share their breakout session ideas
  + Must moderate to prevent rambling introductions, sales pitches, and personal agendas, e.g., “I’m looking for a Bitcoin job”
* Responsible for leading the scheduling of breakout sessions and communicating to the leaders (who proposed topics) and attendees (so they can plan their personal activities at the event).
* If there are multiple spaces, assign multiple MC’s that are responsible for each space.

### **Creatives**

* Any designer that helps to create assets that are necessary (slides, flyers, announcements)

### **Volunteers**

* Having extra hands available, especially on the day of the event, is invaluable. They can help with the sign-in desk, setting up chairs or tables, audio-visual equipment, clean-up and other tasks.
* For example, at 2024 Nashville, there was a team of 10 volunteers. Each volunteer received an event shirt, making it easy for attendees to spot if they had questions. Volunteers stayed in contact via a group chat in Signal.

# 3. Finances

There are two approaches to financial planning for an unconference. One is to set a budget and let the team work within it. Another is to build the event from the bottom up. This entails creating a pro forma of estimated costs and expected ticket sales. Ticket price options can be adjusted to cover expenses.

It is advisable to clarify spending level decisions, e.g., who is authorized to spend how much. It is also advisable to clarify the process to pay vendors, e.g., will the local node representative pay and be reimbursed or will all invoices flow to beneficiary.

### **Revenue Considerations**

· Sponsorships (discouraged)

· Donations

· Fundraising campaign (day-of)

· Ticket sales

o Early

o Standard

o Student, veteran or other special discount groups

o Last minute

### **Headcount Considerations**

· Estimate sales by ticket type (add to headcount)

· Speaker and special guest invitations (add to headcount, but not ticket sales)

· Staff and volunteers (add to headcount, but not ticket sales)

· Estimated percentage of no-shows (add to ticket sales, but not final headcount)

### **Expenses – Venue Considerations**

· Location, e.g., security deposit, proof of insurance

· Physical equipment, e.g., tents, stages, tables, chairs, whiteboards, markers

· Audio-visual equipment, e.g., microphones, mixers, speakers, projectors

· Food, e.g., food truck or meal catering

· Food, e.g., appetizers, snacks, deserts

· Labor, e.g., bar staffing

· Beverages, e.g., alcoholic offerings, coffee, tea, water

· Ask all vendors for tax exemption for non-profit status

### **Expenses – Marketing Considerations**

· Event shirts for staff and volunteers

· Posters, e.g., schedule of events

· Wrist bands

· Stickers or QR labels for day-of fundraising

· Banners

### **Expenses – Other**

· Travel, lodging, and incidentals

· Contracted staff, e.g., videographer, if applicable

· Speakers dinner after event (optional)

# 4. Venue & Speaker Strategy

It is recommended to decide on the mix of formal presentation, speakers, panels and day-of workshops before locking in a venue location. This is not the soliciting, reviewing and formally scheduling presentations. This is deciding what requirements, e.g., number and size of rooms, are needed for an ideal physical venue location.

The temptation to offer as many breakout sessions as possible can backfire. Too many, and attendees will feel conflicted between attending sessions and continuing their in-person discussions. Should there be dedicated time to network?

Too many sessions, and attendees will skip sessions they are passionate about because of conflicting timing for other topics. How much time should there be between sessions? How many simultaneous discussions will be accommodated?

### **Session Planning Questions**

· Should there be dedicated time to network?

· Will more than one session be conducted simultaneously?

· How will simultaneous sessions be scheduled?

· Will one or more of the sessions use microphones? (noise considerations)

· Is the event going to be a partial day, whole day, multiple days?

· What is the smallest size session that will be added to the day-of schedule?

· What is the largest session expected? Will all attendees attend the opening session?

· How many total people, including staff, volunteers and special guests, will attend?

### **Venue Search Criteria**

Once you have answered these basic questions, then you can move onto venue search.

· Date (see “Preparation & First Steps”)

· Size and room requirements

· Distance to other conferences (see “Timing Alignment”)

· Budget (see “Expenses – Venue”)

· Other special considerations, e.g., venues with facilities and food & beverages

# 5. Tech

Having great technical support sounds obvious, but it is surprisingly more demanding than you may expect if you are new to planning events. It exemplifies why it is advantageous to align with MPB to run an Unconference. Being able to leverage existing systems, and build upon them, will keep your event on track.

### **Website**

The first three Unconferences used a separate page on the MyFirstBitcoin website, something like https://myfirstbitcoin.io/tickets/ . For the fourth event, the teaam created a special unique “Bitcoin Unconference” URL: <https://bitcoinunconference.com/>. Reach out to [arnold@miprimerbitcoin.io](mailto:arnold@miprimerbitcoin.io) to hear about the possibilities to use this domain in order to promote your Unconference.

### **Ticket sale**

As of the time of this SOP version, ticket sales were done on the same Unconference tab on the Mi Primer Bitcoin website. Long term this will need to be separate to ensure it is clear to all would-be-attendees.

Also, at the time of this SOP, the ticket site could not accommodate discount codes. This led to using separate ticket sites for special groups, e.g., veterans and students. Long term this will be addressed. Short term, be prepared to invest extra time for communicating with special groups, and for tracking ticket sales.

### **Pop-up on website**

Tech lead can help to include pop-ups on other websites, like <https://myfirstbitcoin.io/>

# 6. Marketing & Branding

### **Save the date**

* Plant the flag asap, once venue is clear.
* See timeline spreadsheet in “Example Planning Documents”

### **Event date communication**

* Eventbrite
* OrangePillApp
* Meetup.com
* Main event website for satellite events
* MPB website
* Bitcoinunconference.org website

### **Theme**

The Unconference can be branded and themed as an Educators Unconfence. Make it stand out, explain how it’s different from regular conferences in your communications: permissionless, decentralized, co-creation, et cetera.

### **Collaborations**

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### **Press Release**

* [**[PRESS RELEASE EXAMPLE]**](https://docs.google.com/document/d/1Cwmp_HmD8m6apxy-f0WKIo1BOQWcZTB23Kabi3KRQfY/edit?usp=sharing) (convert to pdf)
* Reach out to [arnold@miprimerbitcoin.io](mailto:arnold@miprimerbitcoin.io) for contact list.

### **Post about location**

· <https://x.com/MyfirstBitcoin_/status/1800196345833116065>

· <https://x.com/MyfirstBitcoin_/status/1797659637002486014>

### **Copy for website**

[· **[COPY DOCUMENT EXAMPLE]**](https://docs.google.com/document/d/1OcNtvjRxiq6Z4Zw2Cn_bJ2_5k8w69cQxedGINfKTijA/edit?usp=sharing)

### **Trailer**

· <https://x.com/MyfirstBitcoin_/status/1798354717778571303>

### **Testimonies**

· Contact [arnold@miprimerbitcoin.io](mailto:arnold@miprimerbitcoin.io) for access to footage from precious unconferences

**Flyer**

· <https://www.canva.com/design/DAGKYtugsvw/whoFlDUU5FBHS2OfYpZfgw/edit>

· <https://www.canva.com/design/DAF7TNHbWIE/juqFnZsD-haSo67SIkl5uw/edit>

### **Throwback to previous Unconferences**

* <https://x.com/MyfirstBitcoin_/status/1801253274445611282>
* Search for #BitcoinUnconference
* Contact [arnold@miprimerbitcoin.io](mailto:arnold@miprimerbitcoin.io) for access to drive with photos

### **Reminder available Early Bird Tickets**

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### **Speaker announcement**

* <https://x.com/MyfirstBitcoin_/status/1756733863965958359>
* <https://www.canva.com/design/DAF7TNHbWIE/juqFnZsD-haSo67SIkl5uw/edit>

### **Example Speaker Form Sent to “Current Attendees” List**

Thanks so much for joining our 3rd Bitcoin Unconference in Nashville on July 24. We're very excited to welcome you next month at The Cordelle, our venue for the day!

I wanted to draw your attention to something important: this event will be different from regular conferences. It's an Unconference, which means we will create the experience together. As you may have seen on the ticket sale website (or may not have), we're open to receiving ideas for talks and speakers, specifically talks about Bitcoin Education. Our team will evaluate these submissions over the next few weeks and see which speakers and ideas we can confirm. If you haven't already, please take a look at this form. Thank you to everyone who has already filled it out.

There will also be an opportunity to present or pitch your ideas at the beginning of the Unconference. This will happen more organically than if you were to apply today. Both options are available, and we're very excited to hear from you either way. If you plan to attend just as an attendee and don't have anything particular to share, that's fantastic as well.

Ps. We're almost running out of Early Bird tickets, so if you know fellow bitcoiners that are on the fence of joining, this may be a good reason to reach out to them again!

See you next month!

### **Speaker Form on socials**

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### **Schedule preparation**

·

**Schedule announcement**

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# 7. Operations

### **Identify high name speakers**

· Previous Conferences:

* Preston Pysh
* Jeff Booth
* Guy Swan
* Ella Hough
* Arsh Molu
* Efrat Fenigson
* Roger Huang
* Bitcoin Veterans (Gabe Lord, Alex Stanczyk, Jordan Gambrell, Shane Hazel)
* Arnold Hubach
* John Dennehy
* Adam Nili
* Andrew Begin
* Natalie Brunell
* Ben Parrin (BTC Sessions)
* Mike Peterson

**Speaker/workshops form on website**

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### **Speaker/workshops decide/review/timeline/schedule**

· This should be a committee of multiple people in the tame that sits together, curates the lists of speaker applications and comes up with a schedule. Keep in mind that it’s an Unconference, so it’s fine if not all spaces are filed with pre-scheduled speakers. Keep space for day-of discussion!

### **Contact with volunteers**

· Explain schedule

· Explain responsibilities

· Ask for shirt sizes

· Ask for help capturing photos, videos and testimonials

### **List of duty for volunteers**

* Set-up chairs, tablecloths, etc.
* Check in on arrival
* Audio help, e.g., mixer controls
* Assist MC, e.g., guiding people to sessions
* Collect testimonies
* Take photos, videos for future marketing
* Fundraising day-of
* Tear-down, clean-up

### **Tickets Distribution**

· To staff

· To volunteers

· To invited guests and speakers

· Automatic send to online payment

### **OS Everything**

To really showcase the power of open source, we printed this SOP and BluePrint and hang it in big size format during the event. The files can be downloaded from here, <https://github.com/MyFirstBitcoin/OS-Everything/tree/main/Unconference> in the folder Planning References.

# 8. Props Kit

### **Check-in table**

· Scanner/phone to scan QR code from attendees

· Laptop to check names of arrivals

· Printed list of attendees as backup to give to volunteers at check-in

### **Merchandise**

· Flyers

· Wristbands

· Shirts for staff and volunteers

· Bring something nice for the volunteers so attendees can distinguish them from others, and so there is also a present/gift of gratitude.

· Collect their size on time!

### **Other Marketing**

· Banners

· Schedule posters printing

· Slideshow with agenda and main stage

# 9. Post-Event Checklist

* Send thank you message to all speakers
* Survey and compile attendee feedback. Share with team before AAR.
* Collect recording, photo materials, e.g., from contractors and volunteers
* Finalize financials, e.g., expenses, ticket sales, donations or sponsorships, fundraising, etc.
* Schedule after-action-report (AAR) meeting with planning
* Update SOP and Github with lessons learned

# 10. Example Planning Documents

### **Timeline planner (Excel)**

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### **Save-the-Date announcement**

· <https://x.com/MyfirstBitcoin_/status/1782759136502874451>

### **Letter to attendees promoting opportunity to speak**

·

### **Speaking proposal form**

· <https://docs.google.com/forms/d/1QN-aGdyW2_fmiNzb7r_WodGgxQDjZISYf5qWxkkOc-M/prefill>

### **Attendee thank you & request for feedback**

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### **Speaker thank you**

· <https://docs.google.com/document/d/1FE5LjCBo6tpnfFm_FhW8W-dSIjeWSdhAjdxtqKVrvWo/edit?usp=sharing>

### **Marketing flyers**

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### **Speaker announcement**

· <https://x.com/MyfirstBitcoin_/status/1756733863965958359>

### **Slider background**

· <https://docs.google.com/presentation/d/1ktrYuVFh6y9_BVNga48LcqodfWMgo_bJLjPgr9PSoHk/edit?usp=sharing>

# 11. Lessons Learned Nashville 2024

### **Marketing & ticket sales**

· We were competing with many overlapping events for the same potential Nashville attendees, and the same potential speakers

· Even influencer names did not boost ticket sales as estimated

· Using all types of social media accounts help, e.g., LinkedIn, OPA, et al, worked well

· Low ticket price was good for attendees compared to other formal events

### **Ticket sale website user experience**

· Ticket sale website more reliable and simpler

· Website should be a separate, standalone URL to make it more clear to

· Multiple tickets in 1 order

· Easier for media/volunteers/staff to get tickets

· We need discount codes, not separate pages for Veterans or for students

· Attendees wanted receipts

· Need to have protocols in place to verify we are online daily, e.g., ensuring our ticketing site has not gone down.

### **Day-of schedule**

· Attendees were conflicted between listening to some sessions and networking. Dedicated time and space for networking and reducing overlapping sessions would allow attendees to both participate in sessions and still network.

· Overlapping schedules was generally not received well

· Noise from people networking was distracting

· Noise from the upstairs and downstairs areas was distracting (floor/ceiling had zero insulation … you could see through floor boards)

· Games were interesting. Some attendees seemed to enjoy the fellowship and networking time. Should we include in future unconferences?

### **Coordinating day-of workshops**

· Pitches took longer than planned. And some attendees drifted into personal backgrounds, wishful thoughts, job searches, and other subjects not central to the educators theme.

· Need better ways to communicate schedule once complete. For example, an event app where attendees could check their phone would be more convenient than a white board.

· White boards in every breakout session room?

### **Food & Beverage**

· Food truck offering was not communicated well. Consequently, we had to pay the minimum hour rate \* 2 hours.

· Hors d’oeuvres were good

· Coffee, tea and water offerings were good

· Beer and wine were good. It was nice to have everything included in ticket price and not have to pay for a cash bar on top of ticket.

### **Finances**

· We did not breakeven. Some things like eliminating the food truck are easy cost reductions. Increasing number of tickets sold or price of tickets is another consideration.

· We approved a projector with the video equipment vendor the day of. This was an additional cost and we had trouble resolving what the agreed-upon-price for the ad hoc rental was.

### **Venue**

· Street parking was free. Did not hear anyone complaining of issues.

· Facility itself was nice

· Mosquitoes were annoying for some on the porch and under the tent