Planning Tools

Kanban boards, checklists, wiki pages, and surveys for organising your gathering.

- Kanban Boards
- Checklists
- Wiki Pages
- Surveys

Kanban Boards

Kanban boards give your organiser team a visual way to track tasks. Cards move through columns (e.g. "To Do", "In Progress", "Done") so everyone can see what needs doing and what's already been handled.

Board types

Each gathering can have multiple kanban boards, each with a type that reflects when the tasks apply:

Type	Purpose
Planning	Pre-event tasks (venue booking, shopping lists, form setup)
During	Tasks to manage during the gathering itself (kitchen rota, ritual prep)
Post	Post-event wrap-up (cleaning, thank-you messages, financial summary)

Creating a board

1. Open the gathering and click the **Kanban** tab
2. Click **+ New Board**
3. Give the board a name and select a type
4. The board is created with default columns; you can rename or add columns as needed

Working with columns

Columns represent the stages a task moves through. A typical setup might be:

- **To Do**: tasks that need doing
- **In Progress**: tasks someone is actively working on
- **Done**: completed tasks

You can add, rename, reorder, or remove columns to fit your workflow.

Working with cards

Cards represent individual tasks. Each card supports:

Feature	Description
Title	A short description of the task
Priority	LOW, MEDIUM, HIGH, or URGENT
Due date	When the task needs to be completed by
Category	A label for grouping (e.g. kitchen, accessibility, ritual, logistics)
Assignee	A member of the organiser team responsible for the task
Comments	A threaded discussion on the card for collaboration

To create a card, click **+ Add Card** at the bottom of any column. Drag cards between columns as their status changes.

Tips

- Keep card titles short and action-oriented (e.g. "Book venue" rather than "We need to book the venue")
- Use priorities to highlight what's urgent; the URGENT level is useful for last-minute tasks during a gathering
- Assign cards to specific team members so it's clear who's responsible
- The comments feature is handy for quick updates without needing a separate chat thread
- Consider creating separate boards for different phases rather than one massive board

Checklists

Checklists provide a straightforward way to track tasks that need completing. They're simpler than kanban boards; just a list of items that can be ticked off as they're done.

Creating a checklist

1. Open the gathering and click the **Checklists** tab
2. Click **+ New Checklist**
3. Give the checklist a name (e.g. "Kitchen prep", "Venue setup", "Post-gathering cleanup")
4. Add items to the checklist

Checklist items

Each item in a checklist can have:

Feature	Description
Text	The task description
Due date	When it needs to be done by
Assignee	A member of the organiser team
Notes	Additional context or details
Completed	Whether the item has been ticked off

When someone completes an item, the system records who completed it and when.

Planning phases

Checklists support planning phases that align with the gathering timeline. The available phases are:

- **Three months before**
- **Two months before**
- **One month before**
- **One week before**
- **During** the gathering
- **Post** gathering

If you don't specify a phase, the system auto-detects the current phase based on the gathering dates. This is useful for filtering; you can quickly see just the items that are relevant right now.

Tracking progress

The checklist progress view shows:

- Overall completion rate across all checklists
- Per-phase completion rates with progress bars
- A list of overdue items that need attention

This gives you a quick health check on how planning is going without needing to open each checklist individually.

Tips

- Use checklists for recurring tasks that are the same for every gathering (e.g. "order firewood", "set up first aid kit")
- The template support means you can create a standard checklist and reuse it across gatherings
- Combine checklists with kanban boards: use checklists for simple "done/not done" tracking and kanban for more complex tasks that need discussion and assignment
- Check the overdue items list regularly as the gathering approaches

Wiki Pages

Wiki pages let you create and share information about a gathering. Think of them as a mini knowledge base; you can write pages about the venue, house rules, kitchen guidelines, ritual plans, or anything else participants and organisers need to know.

Creating a wiki

1. Open the gathering's **Overview** tab
2. Click the **Create Wiki** quick action button
3. This opens the **Wiki** tab, where you can start adding pages

Adding pages

1. On the **Wiki** tab, click **+ New Page**
2. Give the page a title and URL slug
3. Write the content using markdown
4. Set the display order (lower numbers appear first in the navigation)
5. Click **Save**

Publishing pages

Wiki pages start as drafts. To make a page visible to participants:

1. Open the page
2. Toggle the **Published** switch, or click **Publish**
3. The page is now publicly visible to anyone viewing the gathering

You can unpublish a page at any time to hide it while you make changes.

Page features

Feature	Description
Title	The page heading
Slug	URL-friendly identifier, unique within the gathering
Content	Markdown-formatted text
Order	Display order in the page list (lower = higher in the list)

Feature	Description
Published	Whether the page is visible to participants
Version	Auto-incrementing version number for tracking changes

Common wiki pages

Here are some pages that gathering organisers typically create:

- **Welcome and arrival info**: directions, what to bring, house rules
- **Kitchen and food**: meal schedule, kitchen rota, allergy information
- **Ritual and workshops**: schedule of workshops, ritual guidance
- **Venue guide**: maps, facilities, fire safety, quiet hours
- **Practical info**: WiFi details, nearest shops, emergency contacts

Tips

- Use markdown formatting to keep pages readable; headings, lists, and bold text all work
- The version tracking means you can see how many times a page has been updated, which is useful for pages that change frequently (like the workshop schedule)
- Consider creating a "What to bring" page early in the planning process; it's one of the most commonly asked questions
- Wiki pages are specific to each gathering, so you can tailor the content to each event

Surveys

Surveys let you collect feedback from participants after a gathering. They use the same form system as registration and carpool forms, but with a **SURVEY** type.

Creating a survey

1. Open the gathering's **Overview** tab
2. Click the **Survey** quick action button
3. This creates a new **SURVEY** type form linked to the gathering
4. Build your survey fields using the schema editor
5. Set a URL slug so you can share the link with participants
6. Set open and close dates to control when the survey is available
7. Click **Save**

Common survey questions

Post-gathering surveys typically cover:

- Overall experience and satisfaction
- What worked well and what could be improved
- Feedback on specific aspects (food, accommodation, workshops, rituals)
- Suggestions for future gatherings
- Whether the participant would come again

Viewing responses

Survey responses appear in the **Survey** tab (or via the **Forms** tab). You can:

- View individual responses
- Export all responses as CSV, JSON, or markdown for analysis
- Filter by submission date

Tips

- Keep surveys reasonably short; participants are more likely to complete them if they don't take too long
- Send the survey link within a week of the gathering ending, while memories are fresh
- Share a summary of the feedback with the community; it shows that organisers value input and helps build trust

- Anonymous submissions are supported if you want participants to feel comfortable giving honest feedback
- You can set a maximum number of submissions if needed, though for surveys this is rarely necessary