

# Logistics of Organizing the FOR Symposium

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## Abstract

Organizing this symposium was a tremendous learning process for all of us. Here, we record the process we used, and the guidelines we'd follow (or not!) if we were to do it all over again. We hope they're helpful to junior scientists looking to organize meetings of any kind, but especially those dealing with systemic issues affecting the research enterprise. The organizing tips are presented below in topical "chunks" arranged in the chronological order we found they first required attention. However, most chunks have tasks that need to be executed over a long time scale. To facilitate the management of this, we assigned individual people to coordinate many of them. If you'd like to organize your own symposium on these topics, please feel free to use whatever assets we have that may be useful to you. We would be delighted to offer additional advice; please feel free to contact us at [info@futureofresearch.org](mailto:info@futureofresearch.org). We'd love to help spread the word about your meeting!



## Logistics of Organizing the FOR Symposium

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Organizing this symposium was a tremendous learning process for all of us. Here, we record the process we used, and the guidelines we'd follow (or not!) if we were to do it all over again. We hope they're helpful to junior scientists looking to organize meetings of any kind, but especially those dealing with systemic issues affecting the research enterprise.

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### ASSEMBLING AN ORGANIZING COMMITTEE AND SETTING A MISSION

- Tap into existing networks (like your post-doc associations (PDA)) to find like-minded collaborators and start building a mailing list to communicate with one another (for example, using Google Groups).
- Identify senior mentors, if possible. Ideally this is someone sympathetic to your cause who can help spread the word and advocate for you. Postdoctoral offices can be particularly useful in providing support and contact information, or acting as a point of contact for outside parties.
- Find a name for your event.
- Write a mission statement together. If you make a long version, also write a short one (2-3 sentences) that can be included in emails. Establish your specific goals (in our case, holding a symposium and writing a report of the meeting afterwards) and set timescales/milestones for completing it. Also determine the scope of the meeting. What topics will you cover, and who is the intended audience?
- This is a good time to establish a collaborative editing platform. We used wikispaces, but other choices like Hackpad or Google Sites would work well too; the latter might have provided better integration with Google Docs.

### SETTING A TIME, DATE, AND A KEYNOTE

- Together with your team, set an approximate schedule for the meeting. For instance, we planned to have introductory remarks, a keynote, a panel (10 minute talks followed by time for Q&A), and a

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reception the first night, then another panel, lunch, interactive breakout sessions, and then closing remarks on the second day.

- Identify a small set of possible dates that is ideally 6-9 months in advance. Be aware of religious holidays and any local events (i.e. other conferences) that may compete for attendees.
- Identify a keynote speaker; we did this by proposing names, discussing them, and then voting to create a ranked-order list.
- Contact the potential keynote speaker and together with them, find a date that works.

### FINDING A VENUE

- Based on anticipated attendance and session format, make a list of the spaces you'll need: a lecture hall? Classrooms for breakout sessions? A place to serve lunch or refreshments?
- Reach out to your network to find appropriate venues, and if necessary, find partners to help. Student organizations often have the privilege of reserving rooms with reduced fees.

### ESTABLISHING A WEB PRESENCE

- Once you have a date, time, and place, make a simple website that announces your event. We used Wordpress.com which has the benefit of enabling very simple collaborative editing. Domain name registration is available through this platform form for < \$30. Include in the site:
  - A home page listing where (with map), when, who is organizing it and who can attend, and why (your mission statement).
  - A signup form so that people can easily pre-register for the event (i.e., be notified when registration is open).
  - A sponsor page or widget where you will show sponsor logos.
- Set up social media. Consider using a tool like HootSuite to manage simultaneous posting.
  - Set up a Facebook page, rather than a group; this provides a simple interface for followers. Consider use of a group for more engaged/organizing members.
  - Set up a group on LinkedIn; LinkedIn was particularly useful for engaging with non-academic professionals.
  - Set up a Twitter account, which allows rapid dissemination of information and can also be used for live-tweeting during the event. Also make use of a hashtag to allow easy monitoring of questions asked over Twitter and to allow people to join the conversation widely.
  - Make sure that as well as sharing information through the accounts, that all organizers are also sharing, re-posting and retweeting from their own accounts to spread the news and information more widely still through all their networks.
  - Blog early and often. Make sure that every blog post written by an organizer is widely disseminated through all these networks. Blogging can be based on one particular site, whilst also soliciting guest blogs (see Advertising).

### SPONSORS & RECEIVING MONEY

Set up an account and begin identifying sponsors at least 3-6 months prior to the event date:

- Sponsors:
  - First, create a tentative budget for your event.
  - Based on the budget, set sponsorship tiers with varying levels of acknowledgement. All sponsors should appear on the program and website. For example, see our projected budget and sponsor tiers in the prospectus, listed below.
  - Make a sponsor prospectus: a pdf document that will explain your event and what your sponsors will receive in return for their investment. You can download FORsymp's [here](#) (also available as Supplementary File 1).
  - Build a spreadsheet including the organization you are approaching, contact person and email

address, date contacted, and responses. Reach out to personal contacts where possible; approach academic departments and offices as well as industry and professional societies. Make use of senior mentors who may have more senior contacts in possible sponsor organizations. All FORsymp sponsors can be seen on the [sponsor page of our website](#).

- Send contact emails - a sample template is [here](#) (also available as Supplementary File 2).
  - Begin with a short description of the event, describe the need to involve the community, perhaps note their previous involvement in similar initiatives, and describe what sponsoring this event will signify to the life sciences community.
  - Attach a copy of the sponsor prospectus to the email and include links to your website.
  - Name-drop speakers and existing sponsors.
  - Have the person writing the email record the date on the on the sponsor spreadsheet.
- When commitment is made, send follow-up email explaining:
  - How to submit funds (check, address, etc.).
  - Requesting a high-resolution logo and permission to use it as agreed.
- Acknowledging sponsors:
  - Add their logo to the “sponsor” page of the website immediately, linking to their website.
  - Add their logo to the program and signage for the event.
  - Acknowledge them in any publications or reports that come out of the meeting.
  - Send a thank-you note after the meeting is over along with links to photos, a write-up, etc.
- Tips
  - ASCB has a [specific funding mechanism](#) for supporting meetings organized by postdocs and graduate student members.
- Institutional accounts: identify who at your institution can set up an account. Challenges: make sure you can transfer money to other accounts and that you set up an account that doesn't require an indirect cost percentage.
  - Find out who will receive the funds (a person in your group in charge of finance to track all of the accounting). Use their address as the mailing address for checks
  - Find out how checks should be addressed. This will depend on your institution, and the rules there: this is often very specific; if checks are not correct from the start this will cause major challenges.
  - For large donations or industry donations, be prepared to deal with:
    - Tax forms (W-9)
    - Contracts (industry- grants office)
  - Look into institutional requirements for payments to expedite all payments. Once the repayment process is underway it is important to follow up with the administrators and make sure the funds make it to payment. Know the requirements for:
    - Reimbursement for members of the organizational team who pay event costs.
    - Travel reimbursements for non-employees (i.e. receipts (original vs. photo copy/email) and SS#)
    - Vendors: For invoicing make sure that all vendors have the correct information about who should be billed. Correspond with your account office as described above for the correct information.

## VENUE LOGISTICS

- Identify what forms are required for booking space, A/V, catering etc.
- Booking space: (cost: ~\$300: working with a student organization allowed for only minimal facilities costs.)
  - Be sure that any physical space including lobby and hallway area is reserved and okay to use according to the reservation office or building management.
  - Facilities
    - The venue often requires you to get in touch with facilities as there may be costs for extra personnel to assist with the setup/break down of tables, chairs and etc.

- We requested 2 tables for registration (though depending on the number of name tags you have, 3 might be better) and several chairs.
- We requested 2 tables and chairs on the stage for the panel discussions as well.
- Audio/ Visual: (Cost: ~ \$2,400)
  - Audio
    - Microphones on stage, and one in the audience for questions.
    - Sound recording. In our case, we were able to get an audio out from the A/V tech who worked at the event.
  - Visual
    - Is a computer available at the podium, and how reliable is it? We ended up bringing our own Windows laptop and transferring speakers' slides to it.
    - Recording video: we set up a camcorder in the balcony of the auditorium and later matched it to the audio. In addition, we had an iPad to record the audience questions during the panel discussion.
    - Photography: we used outside photographers recommended by the Harvard Medical School Office of Communications and External Relations. Ensure that final photos can be shared online, etc.
  - Internet
    - Set up a guest log-in for the event, and provide this information in the programs (see Printing) or on your sponsor marquee (see Day Of The Event Checklist).
- Catering (Cost ~ \$5,000)
  - Consider the number of participants, and account for a 50-66% attrition rate, particularly if the event is free.
  - For our two-day event:
    - Day 1: Reception. This was an important event where attendees and speakers could discuss the topics presented. This was the peak of attendance.
      - Food - we selected an appetizer package that cost about \$10 per person. Because of the timing of our event (talks from 5pm - 8pm), most participants probably hadn't eaten in many hours by the time of the reception.
      - Alcohol - we had about 20 bottles of wine at \$15 a bottle.
        - Permits (this cost us \$100)
        - Your host institution may require a police detail, which cost approximately \$50/hour in our case.
    - Day 2: Lunch and coffee break. Be careful to adjust for attrition between the first and second days; we had only half as many attendees on the second day compared to the first.
      - Boxed lunches cost us \$9.50 per person
      - Coffee cost us \$3.50 per person
- Printing (~\$800)
  - We used uPrinting for our posters (actually classified on their website as "flyers"), programs ("brochures") and meeting signage ("posters"). For economical shipping, order at least 2 weeks in advance.
  - Our drape cloth for the front of the registration table came from Spoonflower; 1 yard of printing on their "Performance Pique" or "Performance knit" which are both wrinkle-resistant is approximately \$25 with shipping.
  - You can print name tags yourself, perhaps using Eventbrite's badge generation tool; more info and compatible templates for standard printers can be found [here](#). If you use adhesive name badges, which are the most economical, consider printing a copy for each day of the event. Before you do this, make sure your speakers and organizers are included in your database of name tags to print.
- Workshop supplies (~\$300)
  - Post-it notes, giant post-its or butcher paper (primarily useful for saving/preserving arrangements of post-its), lots of markers.

### COMMUNICATING WITH SPEAKERS

- We used a process similar to the one employed to select a keynote to pick the rest of our speakers. We made a spreadsheet of potential invitees and tracked them just as we did with the sponsors.
- Invite them to speak - template email [here](#) (also available as Supplementary File 3). Include a description of the event, as well as a justification for why you are asking them in particular to participate. Communicate very clearly the length of time they are being asked to speak, whether or not they can have visual aids, when they should arrive (allow 30 minutes or so to make sure their slides are working, if they have them), how long they are being asked to stay at the meeting (i.e., do you want them to attend other sessions?), and critically, the desired content of the talk. If you know whether you will be able to reimburse expenses, state this as well, and let them know if you plan to record the sessions.
- When confirmed, collect a photo, short bio, and talk title as soon as possible to begin assembling a program. If the speaker is traveling, ask if they need any recommendations for hotels, etc. Ask them to save receipts for reimbursement, if needed.
- Send an email a few days before the event to confirm and ask if they need help with any final logistics. For example, if they have visual aids, ask them to bring their talk on a USB stick to facilitate faster switching.
- On the day of the event, have printed copies of a video release form for them to sign; we used an adapted version of [this form](#) (also available as Supplementary File 4).
- After the event, send thank-you notes and also reminders of the reimbursement process, if applicable.

### ADVERTISING

- When your website with preregistration is up, share an invitation to save the date via social media.
- Place the event on calendars of local institutions, etc., and ask for it to be added to any rotating advertisements in elevators, on monitors in halls, etc.
- Once (most) speakers are confirmed, make a poster to advertise the event. We used “flyers” from uPrinting for this purpose (order 2 weeks in advance); 500-1,000 would have been sufficient for us. Distribute these to be placed in as many buildings as possible. Save some posters to repost on high-traffic boards when registration opens.
- When registration is open, go for another big advertising push; directly ask potentially sympathetic people to share and retweet your posts and again ensure that all organizers are already doing so.
- Compose emails to the managers of listservs (think department admins, postdoctoral association presidents, etc.) asking them to forward an announcement about the meeting. Ideally, send 2-3 emails to each list, with different subject lines (“1 week left to register!” etc.).
- Try to arrange guest blog posts or opinion pieces (see our examples [here](#) from before the symposium, and (McDowell, Krukenberg and Polka, *The Future of Research Symposium: Facilitating Postdoctoral Involvement in the Future of Science* 2014); (McDowell, Krukenberg and Polka, *An open letter to AAAS journal "Science": Postdocs need to address "The Future of Research" 2014*)).

### WORKSHOP LOGISTICS

- Decide on workshop topics and goals. Remember that people will come to these sessions with mixed (and mostly limited) backgrounds in understanding some topics, especially funding and workforce structure. For example, we asked participants to identify problems with the current system and propose potential solutions, but had no time to discuss or debate each of these in depth. It may be more productive to make the primary goal of the workshop to identify the biggest problems and their root cause, and then have participants propose potential solutions to end the session on a positive note.
- We were fortunate to have Manu Sarna train members of our group on his workshop moderation

method. We have posted the notes from that session [here](#) (also available as Supplementary File 5).

You will probably want to run a similar session with your group.

- Appoint members of your group to moderate each workshop (we had 3-4 organizers for each, so that the workshops could have been split into 2 if there were more than 30-40 participants). Task the moderators with refining the topics and goals for their workshop and designing appropriate prompts and questions.
- After the initial training session, also schedule a session at least a week before the symposium where moderators can do a dry run to practice.

## REGISTRATION AND COMMUNICATING WITH ATTENDEES

- Open registration about 1 month before the event. If you open it too early, people may forget they have registered.
- Set a registration cap of AT LEAST 2x, and possibly 3x, your maximum number of attendees, especially if the event is free (which we recommend to reduce all barriers to participation). For example, we had 650 people registered for our symposium, and approximately 200 actually came.
- We used Eventbrite, which allowed the creation of a nice landing page with an integrated map, scheduled emailing to participants, and the option to generate name badges or check-in tools (which we did not end up using). We got a small number of registrations directly through the Eventbrite listings as well. That said, a simple Google Form could also have worked.
- Customize the information collected during registration to include some demographic info. For example, collect job title, institution/company, etc. Include optional gender/minority status fields so that you will know if you need to do a better job of reaching out to a particular population.
- Consider collecting an entry survey (see our example [here](#); we've modified the lead text since we are still collecting responses). We used this to help us focus our questions for the workshops (see above). You could either add optional questions to the Eventbrite registration form (clearly not anonymous), or set up a separate Google Form, which by default collects only a time stamp. You can change the redirect page upon completion of Eventbrite registration to the survey URL; make it very clear that registration is complete and that this step is optional and anonymous, but will help you focus your meeting. Also include disclaimers about how the information will be shared and published. Be aware that non-anonymous data collection is much more problematic and may require IRB approval.
- Once registration is open, send an email to everyone on your preregistration list.
- Schedule emails to send out to registrants, including a reminder (Eventbrite schedules one 48 hours in advance by default). Include any information on background material, etc.

## DAY OF THE EVENT

- Checklist to bring:
  - Name tags
    - We used adhesive name tags but more formal name tags would have been better for a multi-day event, though high attrition rates would drive this cost up. If you use adhesive name tags, make one set for each day of the event. Also bring blanks so that on-site registrants can make their own.
    - Make sure your organizers & speakers have name tags.
    - Consider keeping unclaimed name tags to identify actual vs. registered attendees.
  - Sheets for on-site registration. It is most important to collect a name and email address; you may also wish to ask for a job title and institution.
  - Signage. We printed two large posters listing schedule and sponsors for the doors of the auditorium, and a banner with our logo that hung under the registration table (see above, under "Printing.")
  - Video release forms for speakers.
  - Laser pointer.

- Slide advancer.
- A reliable laptop for the podium (if this is not provided by the venue)
  - Display adapter(s).
  - Make a sponsor logo marquee and set it as the wallpaper; it will be displayed as you switch between slide decks.
- USB stick for moving talks to the laptop.
- Post-it notes, markers and large post-its or butcher paper for the workshops, including paper copies of the workshop evaluation survey, if applicable.
- Printed timelines for the workshops for each of the moderators.
- Water for the speakers.

#### **AFTER THE EVENT**

- Collect and post video, photos, and audio. We used a Google+ account for this, as it allowed us to make a YouTube channel and host a lot of pictures.
- Thank sponsors (see above).
- Thank speakers (see above).
- Meet with your organizers and any other interested people to discuss the next steps as defined by the original mission statement and goals.

#### **FURTHER INFORMATION**

We would be delighted to offer additional advice; please feel free to contact us at [info@futureofresearch.org](mailto:info@futureofresearch.org) and look at our freely-available resources at [futureofresearch.org](http://futureofresearch.org).

#### **ACKNOWLEDGEMENTS**

Many thanks to all of those who contributed to the organization of the Future of Research: see our contributor's efforts [here](#).

#### **REFERENCES**

McDowell, Gary S, Kristin A Krukenberg, and Jessica K Polka. 2014. "An open letter to\n AAAS journal "Science": Postdocs need to address "The Future of Research"." *The Winnower*. doi:10.15200/winn.141141.10013.

McDowell, Gary S, Kristin A Krukenberg, and Jessica K Polka. 2014. "The Future of Research Symposium: Facilitating Postdoctoral Involvement in the Future of Science." *Journal of Postdoctoral Research* 57-64.

#### **APPENDIX**

see our contributor's efforts [here](#)

Supplementary Files are attached.

Supplementary File 1: Future of Research Sponsorship Prospectus

Supplementary File 2: Sponsor Letter

Supplementary File 3: Speaker Letter



Supplementary File 4: Photograph and Video Release Form

Supplementary File 5: Moderator's Handbook: Running the Interactive Workshops