



## GUIDELINES FOR OCB SCOPING WORKSHOPS

In order to be as focused and effective as possible, scoping workshops should be limited to 50-60 participants. Please devise a consistent and transparent system for determining who will participate (e.g., application process), and to the extent possible encourage external input from and dissemination of workshop ideas to non-participants (e.g., pre-meeting and meeting blog, social media, web-broadcast of talks, posting of talks on website, etc.). Although it is good strategic planning to invite a few key people that you think would contribute to a productive meeting, we strongly discourage a completely exclusive, 'invitation only' approach, as this may promote the perception that OCB is not open to community input. Workshop organizers should identify an approach that remains faithful to the OCB model of community-driven scientific planning.

You will need to establish a workshop committee to develop evaluation criteria and make final decisions on the participant list. This committee will also be responsible for contacting and booking potential speakers, developing a workshop agenda, guiding the workshop discussions, and overseeing the generation of science products from the workshop. Please maintain a strong emphasis on *implementation* and the *OCB scientific objectives* when developing the agenda. In addition to plenary talks, the meeting should provide plenty of opportunities among participants for active discussion and planning of focused research activities. **There should be a workshop report submitted within 4 months after the workshop**, and some material (e.g., talks) should be made available as soon as possible during or after the meeting via the workshop website. Additional workshop products might include white papers, special journal volumes, data syntheses, websites, etc. It is hoped that the discussions at the workshop and by the broader research community will stimulate related multi-PI proposals for submission to funding agencies. If necessary, regular teleconferences for scoping workshop committee members can be arranged through the OCB Project Office (Contact: Heather Benway, [hbenway@whoi.edu](mailto:hbenway@whoi.edu)).

Workshop committee members' and invited speakers' travel will be covered in full, and remaining funds should be used to cover hotel expenses, catering, supplies, etc. Participants (who are not invited speakers) are expected to pay for their own travel to and from the workshop. **OCB scoping workshop funds cannot be used to cover salary.**

## **LOGISTICAL TIMELINE**

Please note that these are *only* intended to be helpful guidelines for workshop planning based on previous experiences of the OCB Project Office. You may find that some of this information is not relevant to your workshop. If you have questions, please contact the OCB Project Office staff (Mary Zawoysky, [mzawoysky@whoi.edu](mailto:mzawoysky@whoi.edu)).

### **MONTHS BEFORE WORKSHOP**

- Advertise the workshop as broadly as possible via website, email, social media, etc. (let OCB help with this!)
- Build a meeting website/registration page and set up workshop e-mail list (OCB can help with this!). Be sure to include a space for participants to communicate special needs (food requests, handicapped access, extra nights in hotel, etc.). Website should also include logistical information, such as local maps and directions, transportation to/from airports, etc.
- Set up and track budget throughout – it is often possible to leverage OCB funds with support (equipment, food, etc.) from local venues
- Obtain quotes and reserve hotel room block (make sure hotel is handicapped-accessible)
- Obtain quotes and reserve caterer (breakfast, breaks, lunch, dinner, receptions) – note that the OCB Project Office cannot pay for alcohol
- Obtain quotes and reserve meeting site – including space for plenary sessions, breakouts, poster sessions, receptions, public computer access; be sure there is access to copy machines and printers at/near meeting site
- Work with OCB Project Office to use social media to share the meeting more broadly - tag OCB (@us\_ocb) and set up meeting hash tag
- Keep track of poster abstract submissions – keep a running list of poster abstracts so it can be formatted and printed just before the meeting (set a limit on number of words and provide formatting guidelines for abstracts)
- Reserve a shuttle between hotel and meeting site (if necessary)
- Determine what is needed in the meeting rooms: Data projector, screen, pointer, overhead projector, wireless access, laptop on which to load presentations, large (at least 1-2 MB) data stick for transferring files, microphone, tables/chairs, poster display boards, easels, etc., and make any necessary equipment reservations
- Reserve an A/V technician to help out, especially at beginning of meeting to make sure everything kicks off well – let them know if you plan to webcast the workshop
- Send regular reminders to workshop participants of deadlines for registration, abstract submission, and travel/hotel reservations (if working with a travel agent, provide name/phone)

### **1-2 WEEKS BEFORE WORKSHOP**

- Work with OCB Project Office to print name tags and arrange lanyards, nametag inserts, meeting folders, and any other meeting supplies you need
- Order signage to direct participants to parking and meeting site if necessary

- Arrange ride sharing to/from airport and a shuttle schedule between hotel and workshop if necessary (Letting participants self-organize via Google Docs works well for this)
- Get poster abstracts formatted and printed/copied or posted online, set up poster session (day/location assignments, etc.)
- Work with OCB Project Office to print folder materials (agenda, participant list, local notes, etc.) and stuff workshop folders
- Obtain and mail parking permits for participants
- Plan room set-up
- Print any necessary signs for meeting area, including ‘reserved’ signs for special seats in meeting room
- Verify tables/chairs for meeting area, poster display boards, and easels for breakout sessions (if necessary, breakouts can also be recorded electronically) will be set up prior to workshop
- Get travel vouchers for speakers (i.e., those we are paying for), including a mailing label and instruction sheet for each
- Request talks to be sent ahead of time to load on laptop
- Send agenda to caterer with a final count and any special requests (e.g., vegetarians, vegans, food allergies, etc.)

#### **DAY BEFORE WORKSHOP**

- Make sure meeting area is set up with chairs/tables/poster boards/easels and catering tables
- Set up table for laying out workshop materials (folders, nametags, etc.)
- Pick up laptop and load talks that were sent ahead (and monitor it during meeting – e.g., take it home at night). Also gather extension cords, power strips, laser (or stick) pointers, extra batteries for laser pointer, and microphones
- Pick up necessary room keys
- Make a list of breakout rooms for planning purposes
- Bring nametags, stuffed folders, paper, pens, bowl for pens, bell, and anything else needed for workshop welcome/registration table to workshop site
- Post all necessary signs in/around meeting area

#### **DAY ONE OF WORKSHOP**

- Come early to set up registration area (put out nametags, folders, pen, bowl for pens, paper, bell or something to make noise to bring people back into meeting room)
- Work with catering staff to make sure they have what they need
- Bring necessary items (Velcro, pushpins, tape) for poster displays
- Work with A/V person to check wifi function, set up laptop, get microphone working, get webcast (if applicable) working, etc.
- Check in with other workshop leaders/planners – if you have the manpower, it is wise to assign a point person to answer participants’ logistical questions (travel, hotel, local points of interest, etc.) and perhaps an additional point person to be a ‘runner’ who can acquire forgotten items and attend to last-minute requests

### **WORKSHOP FOLLOW-UP**

- Take care of all billing after meeting (pay vendors)
- Assemble final budget
- Make sure all talks have been posted on website
- Assemble workshop report!