

Guidelines for workshop proposals submitted through the MARGINS Office

Ideally, the MARGINS Office (MO) would work with the conveners to submit a workshop proposal 12-15 months ahead of the planned meeting. This timeline is especially important if the meeting involves a large number of participants or the logistics are complicated. For smaller meetings with simple logistics, 6 months is the minimum time between submitting a proposal and holding the meeting, and 8-9 months is preferable. What follows is guidance for conveners wanting to submit a proposal through the MARGINS Office. The advantage to the conveners of this route is that the MARGINS Office will help the conveners with much of the logistics, as outlined in the following document describing timelines and division of duties between the conveners and the MARGINS Office. A possible detriment for the conveners is that the grant is awarded to the MARGINS Office rather than the convener's home institution. (Note, however the MARGINS Office will only be able to handle financial matters such as hotel deposits and travel reimbursal, etc., if the grant is to the Office). Whatever route the conveners decide to take, scientific decisions about conference content and format are made by the conveners, with the MARGINS Office supplying experience from past meetings and providing hands to execute the conveners decisions. Workshop proposals may be submitted at any time; NSF typically takes 3-4 months to reach decisions about whether to fund a workshop proposal.

Workshop proposal content if submitted through the MARGINS Office:

- 1) Proposal text can be 4-5 pages and should include:
 - a. Need for the meeting, reason for its timeliness, scientific context
 - b. Target audience in general (scientifically and in terms of # of participants)
 - c. Actual or approximate dates
 - d. Overview of meeting structure, including key topics to be addressed and some keynote speakers. (Note, NSF generally will not pay for participants from outside US institutions, unless they are identified as key meeting conveners, keynote speakers, essential field trip leaders)
 - e. Overview of field trips: their scientific focus and contribution to the meeting; field trip leaders, and their credentials for leading the trip
 - f. Method of advertising meeting (typically advertised via EOS, MARGINS website, and any list-servers provided by conveners) and selecting participants (typically via on-line application form, selection by conveners and approval from MSC and NSF)
 - g. Outcomes from the meeting: website posting of presentations and posters; a meeting summary (for website and newsletter); possibly a book
 - h. Plans for a day spent revising the initiative science plan, if appropriate
 - i. Broader impacts of the meeting including educational goals, science planning, international cooperation (*** see statement below re: supporting international participation).
 - j. Identify a local convener if possible, to help coordinate on-site logistics and supply minor items as needed for meeting
- 2.) Project summary, summarizing the above
- 3.) Budget. Conveners must provide MARGINS Office with:

- *target dates for meeting,
- * number of participants including student helpers,
- *hotels or conference centers that are of the right size and facilities to host a meeting (and contact info) or willingness to use facilities previously used by MARGINS meetings (e.g. Snowbird Conference Center)
- *field trip details including number and size of vehicles needed, miles to be driven on field trip, names of hotels that can provide lodging and meals, any equipment needed for safety (including walkie-talkies, or satellite radio)
- * Presentation needs for meeting (av equipment, internet access, poster supports and materials, large-screen video capacity, etc).

With this information from the conveners, the MARGINS Office (MO) can work with the hotels to determine lodging, catering and meeting costs. Such costs will typically include double occupancy rooms for participants (single occupancy for conveners), 3 meals and 2 coffee breaks a day, opening reception, and meeting room set up with tables for participants plus necessary presentation equipment. The MO will also budget for airfares. All these costs come under the heading of “participant support” on the NSF budget, and carry no overhead. The MO will also budget for advertising costs, and travel costs for MO personnel to attend the meeting. These costs do have overhead associated. There will be no salary support in the workshop proposal for the MO personnel for the work done to assist the workshop planning and execution.

As a matter of philosophy, we want the meeting budget to cover full costs for all conveners, keynote speakers and field trip leaders (including a few non-Americans if appropriate), along with all direct meeting costs (meeting rooms, presentation equipment, coffee breaks). We will budget to provide full support to all other US applicants; however, we’d prefer to guarantee something like “75% or better support” to those not playing an essential role in the meeting. In this way, we can have some reserve if meeting costs, field trip costs or unanticipated expenses are greater than expected. If we’ve budgeted correctly and nothing unexpected happens, then we’d reimburse US participants completely.

4.) NSF-style 2-page CVs for each meeting convener

***NB. Getting international participation can be difficult. So, look at point 1d above. Other options include having collaborators in other countries submit copies of the proposal to their funding agencies to provide travel costs for participants from non-American institutions or working with NSF International Programs to fund travel support from other countries.

For planning purposes, the meeting conveners should send the MO a draft proposal as early as possible. The MO will review it and suggest changes based on experience, while respecting the conveners rights to make policy and science decisions. Given the back and forth on the text, and the time required to get the budgetary details right and agreed to by the MO and conveners, it can take several months from starting a draft version of the proposal to its submittal to NSF by the MARGINS Office. The more cohesive the conveners are in their initial plan, the easier this process will be.