

WORKSHOP TIMELINE/RESPONSIBILITIES

NOTE: This timetable does not take into account the time required to accommodate any Visa requirements for participants traveling from outside the host country. Any participants from countries requiring extended times for visa processing should preferably be identified and invited shortly after funding is approved.

This timeline assumes funding via a supplemental grant to the MARGINS Office. If the Workshop is supported via a standalone grant then financial/contract responsibilities will be transferred to the conveners.

+9-15 Months Prior

Clarify roles of all parties involved

- Conveners (CS) provide MARGINS Office (MO) w/ proposal text & work with MO to develop budget CS decide on official (short and sweet) name of Workshop; MO create Workshop logo with CS oversight
- CS identify tentative list of invited speakers
- CS provide information about basic needs and wishes & MO/CS make initial inquiries regarding Workshop details, including
 - Ground Transportation
 - Lodging
 - Travel
 - Meeting space and conference amenities
 - Field equipment (e.g., radios, etc.)
 - Numbers of grad student participants/workers/drivers for which financial support will be needed
 - The conveners may also choose to request funds for a planning and selection meeting to be held after the participant application deadline has passed.
- Proposal submitted by MO if supplemental grant, or by CS otherwise

Once funding is approved (c. + 6-9 Months Prior)

- MO to design website
- CS identify Grad Student participants/workers/drivers
- Conveners invite keynote speakers and inform MARGINS Office
- MO/CS produce and distribute advertisement (EOS, e-mail lists, others) inviting applications by way of abstract of relevant work and resume.
- MO accepts applications via Workshop website, creates Filemaker Pro (FMP) database to hold responses. Text, PDF, or FMP files of any or all application data may be periodically (or on demand) distributed to CS for evaluation prior to application deadline
- CS make own arrangements for a planning meeting if required after applications for the workshop have closed and abstracts are in hand. MARGINS Office to provide conveners with a Wash U. Travel Expense Sheet for reimbursement
- CS draft acceptance letters (MO can provide draft version) which would provide
 - Level of support for each participant
 - Access to host country Visa applications (if applicable)

- Travel Instructions and “tips” for field trip and visiting host country
- Offer shared accommodations and state single room surcharge (to be paid by participant rather than NSF)
- Inform participants that they are expected to provide the meeting website with a copy of their presentation to go online **after** the meeting (either powerpoint or pdf)
- Circulate preliminary Agenda
- MO signs contracts for main conference elements (sleeping rooms, meeting space) at designated hotel (make deposits with exact participant numbers TBD)
- If applicable, CS identify hotels for field trips and nights lodging required; MO signs contract & makes deposit w/ field trip hotels

Confirmation of participants (c. +4 Months Prior)

- Participant list is selected by conveners and reviewed by MARGINS Steering Committee
- MO sends acceptance letters to invited participants over CS signature
- Participants complete on-line MO form regarding acceptance of invitation, desired accommodations, presentation equipment requirements, field trip acceptance (if optional), open comments
- CS identify tentative vehicle drivers & ensure that all license, insurance matters are OK
- MARGINS Office personnel book their flights for workshop
- CS provide MO with any additional info re: other field trip needs (e.g., vehicle rental & source; restaurants for any group meal(s) to be arranged in advance; radios/GPS units) that MO can arrange in advance
- MO creates PDF Abstracts document based on those submitted by accepted applicants, and distributes to CS for approval.

+3 Months Prior

- MO to match roommates and confirm final count with Hotel(s)/Conference Center, including meeting space and conference amenities
- MO to confirm ground transport arrangements to/from airport to meeting hotel
- MO to confirm all Field Trip arrangements
- MO to finalize catering requirements (meet and greet, business session breaks, meals, etc.) after CS make catering selections
- MO finalize on-line Abstracts document
- MO supplies CS with questionnaire re: AV and poster presentation needs
- MO arranges AV and poster needs with meeting site
- Identify all items that may need to be shipped to meeting site
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+1 Month Prior

- MO identify and obtain all items that will need to be taken with MARGINS Office personnel. Examples include:

- Digital projector, computer, laser pointer
- Presentation markers
- Tacks
- Participant folders
- CS finalize Agenda

+Two Weeks Prior

- MO to circulate emergency contact numbers, hotel confirmations, and ground transport arrangements, URL for abstract volume to participants
- MO to prepare Folder materials
 - List of Participants
 - Travel Expense Reports and envelopes
 - Badges
 - Final Agenda (available through Workshop website)
 - Final Abstracts (available through Workshop website)
 - Notepad and pen?
 - Field trip information (available through Workshop website)

Days of conference

- ***MARGINS Office staff will typically arrive one day early to ensure all arrangements in place***
- CS ensure collection and return of rental vehicles by drivers
- MARGINS Office:
 - Participant logistics support
 - IT support
 - Obtaining copies of presentations
 - Liaising with hotel re: facilities, costs, etc.

Post-Conference

- MO finalizes payment to all workshop contractors (hotel, transport, etc.)
- MO accept updated presentations for website and reminds participants of their obligation
- MO prepares an on-line workshop evaluation form with a deadline for responses after which results are made available to CS for reports/presentations
- MO finalizes post-Workshop website for public perusal
- CS prepares workshop summary for MARGINS Newsletter
- CS serve as editors for MARGINS book, if one is to be produced
- MO reimburses participants for approved travel expenses
- MO reimburses CS and field trip leaders for any out-of-pocket expenses based on receipts provided
- MO summarizes results of workshop evaluation, supplies to CS and makes publicly available via meeting website