

Overview of Running a JACoW Member Conference



Overview of a JACoW Member Conference

- Overview of this overview
 - Provide broad overview of conference organization
 - Who does what, when, where, why, and how (and to whom)
 - Identify committees and key roles
 - Describe scientific, industrial, student, and social programs
 - Describe activities to prepare for and execute the conference, and deliver the proceedings
 - Include abstracts, papers, author feedback
- How does conference organization relate to JACoW?
 - “A semi-newcomer’s soup to nuts point of view”
- This is not a talk about identifying/setting up roles in SPMS/Indico
 - Talk to, or set up a meeting with, JACoW BoD folks separately



JACoW
(You are (not?) here)



Caveat: All Conferences Great and Small

- Not all conferences or workshops are the same
- Here I present some commonalities among many member JACoW conferences and workshops
 - The best authority for how things are done for any given series is someone who has done it before
 - Consistent with the JACoW continuity model
 - Caveat audientia: Your presenter has (strong) IPAC biases
- Many meetings can be (and often are) supplanted by informal organizational processes
 - Phone calls, meetings at other conferences, email, etc
- In the acronym of Larry Wall (designer of Perl): TMTOWTDI
 - (There's More Than One Way To Do It)
 - (Don't even get me started on TMTOWTDIBSCINABTE)

Committees etc

Organizing
Committee (OC)

Supreme
Executive
Authority
(for series)

SAB, Prize Committees, ...

Scientific Program
Committee (SPC)

Organize
Scientific
Program

Can be large with a central
Coordination Committee
down to very small for workshops

Local Organizing
Committee (LOC)

Implement
Conference
Local Details

JACoW
Organization

Resource to
Produce/Publish
Proceedings

Who meets when?

Committees etc

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JACoW
Organization

JACoW **coordinates**
with conference organization

Resource to
Produce/Publish
Proceedings

Who meets when?

Committees and Chronology

- The **OC** meets at least once before the conference
 - Tours venue, provides conference mandate, etc
- The **SPC** meets several (~3) times before the conference
 - Advises SPC chair on classifications
 - Organize scientific program, schedule, synoptic table
 - Recommends, selects, invites invited oral contributions
 - Selects contributed oral contributions from submitted abstracts
 - Balance scientific program: topic, geography, gender
- The **LOC** meets *many* times before the conference
 - Organizes all venue and local items
 - Organizes workforce, budget, registration, web pages, IT, etc

JACoW's Relationship to Committees: OC

- JACoW **interacts** with portions of all three committees
- The OC agrees to JACoW Policies
 - Abide by SPMS/Indico agreement (signed by conference chair)
 - Editors (and preferably also IT) participate in JACoW Team Meetings for least a three-year cycle
 - Maintains continuity, distributes load and information
 - JACoW publishing constraints as detailed at JACoW.org
 - Including abiding by [Creative Commons Attribution 4.0](#)
- **OC JACoW point of contact: Conference Chairs**
 - **Conference chairs are ultimately responsible for ensuring resources available for delivery of the proceedings to Editorial Board and JACoW for publication**

JACoW's Relationship to Committees: SPC

- Through use of **SPMS/Indico** to organize scientific program
- The SPC organizes much of its work through **SPMS/Indico**
 - Recommendations for and voting on invited speakers
 - Abstract submission
 - Recommendations for and voting on contributed speakers
 - Scientific program organization, including statistical balance
 - Paper and presentation submission
 - Email organization/tracking with authors and committee members
- SPMS/Indico SPC coordination by Scientific Secretariat
 - Not explicitly a **JACoW** role
 - Should be JACoW knowledgeable and a team member

- Secretariat job **can** be done without SPMS/Indico – but requires experience!

(More on Scientific Secretariat)

NB Petr's
Comments

- A concept from EPAC and European conferences
 - Stronger coordination than historical US “editor”
- Should participate in all OC/SPC, most LOC meetings
 - Coordinates between all committees
 - Ensures good communication and continuity
 - Can provide expertise from organization of previous conferences
- Primary SPMS/Indico administrator
 - Involved in nearly all functions that flow through SPMS/Indico
 - SPMS/Indico main function: Scientific Program Management
 - More on SPMS/Indico later this week
 - More on Scientific Secretariat in Thakonwat Chanwattana's presentation on IPAC'22 experience

JACoW's Relationship to Committees: LOC

- LOC has greatest interaction with JACoW
 - Personnel and resource management, and budgets, are LOC responsibilities
 - There are many, many roles before, during, and after the conference that are necessary to support the final JACoW objective of producing quality proceedings in timely fashion

(SPMS/Indico DBA)

Scientific Secretariat

Conference IT

Editor / QA

Transparency Editor

Poster Session Manager

Exhibition Manager

Referees

Student Session Organizer

Conference Administrator

Editor / Editorial Board

Repository Manager

Author Reception

Presentations Manager

Registration Manager

Registration Staff

Conference Webmaster

This May Seem Like A Daunting List!

- And it is!

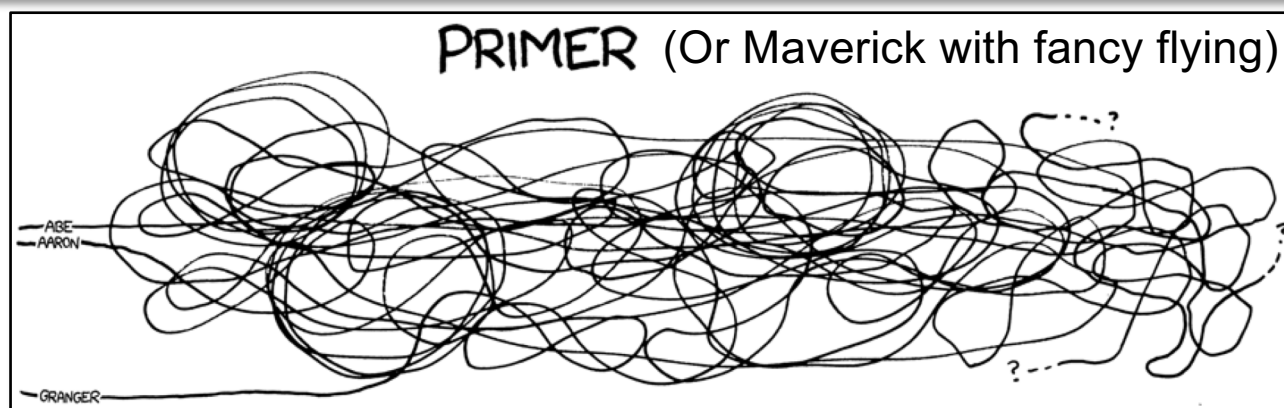
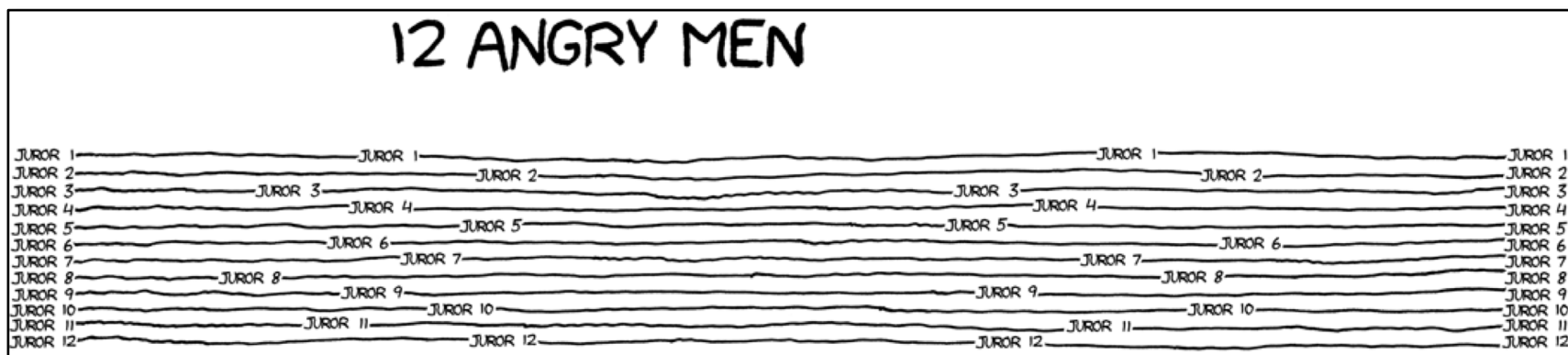


Please don't tell me
we lost an engine.

- Fortunately these roles are well-documented (some in people's heads)
- There are members of the **JACoW collaboration** who are familiar and experienced with each function
- As important as it is, LOC visibility and organization varies greatly between conferences
 - Some LOCs meet early and often and are very structured
 - Some LOCs meet late and not very often
 - **Both can be successful**
 - But the first is far less stressful for those engaged in doing the work of the aforementioned roles!
 - **Experienced JACoW personnel should not obviate the need for a strong LOC** (even an LOC of one or two people)

Conference Roles and Tasks

- The following slides describe my experience with the roles of a “typical” JACoW SPMS-based conference
- Which of these two movie timelines is **your** conference?



<https://xkcd.com/657/>

- Chris has spoken to **timelines and chronology** in previous TMs

Initial Conference Tasks

May Be
Evolving

- Identify conference topic, location, hosting institution(s) and chair(s), dates
 - Often a matter of continuity from the series OC
 - Sometimes decided by a formal bid process
- Identify SPC and LOC chairs
 - They also start gathering their committees
 - Final committee membership is usually approved by OC
- Sign JACoW SPMS/Indico Terms and Conditions
 - Per JACoW.org website, delivered to chair and coordinator
 - Upon approval, an SPMS/Indico instance is created in the relevant geographical area, and configured with some conference info
- Set up initial SPMS/Indico configs (e.g. committee lists)

Conference Tasks: LOC (1)

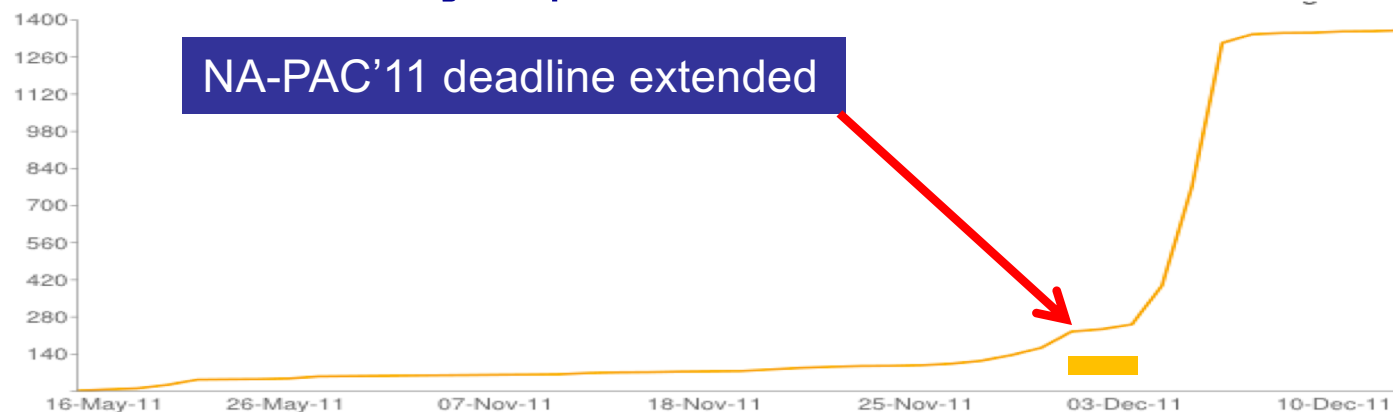
- Start organizing primary LOC membership
- Develop initial attendance estimates, necessary resources, and budget
- Identify Professional Conference Organizer (if used)
- Determine venue location options and negotiate location
- Start developing budgetary associations (e.g. IEEE)
- Start developing visual identity, website
- **Start regular meetings at least 1-2 years in advance of larger conferences**
 - Not explicitly part of the timelines talk
 - Learn from previous conference/workshop experiences
- *Organizers are improving on this in the post-COVID era*

Conference Tasks: SPC Meetings

- Formal and structured (IPACs) to informal (small conferences)
- Run by SPC chair with help from Scientific Secretariat
- **Structures and decides scientific program**
 - Including geographic, institutional, gender balances
- Timelines discussed in previous timelines talks
- Reports from, and coordination with, LOC at each meeting
- IPACs:
 - **SPC/1:** Classifications, SAB membership, program structure
 - **SPC/2:** Selection of invited orals, organize invited program, plenaries and entertainment talks
 - **SPC/3:** Selection of contributed orals, poster layout, session chairs

Conference Tasks: Abstracts (1)

- Abstract submission deadline is usually ~4-6 months out from conference
 - This may vary depending on community and conference
- Physicists generally work towards a known deadline
 - Abstracts **always** spike at the submission deadline



- You will likely **not** get additional abstracts by extending the deadline at the last minute
- Submitted abstracts are QA'd in preparation for SPC/3
 - Make them pretty and shiny to be possible contributed orals
 - Make sure they are in correct main classifications (quotas)

Conference Tasks: Abstracts (2)

- LOC is also very interested in abstract numbers
- Used for other conference projections
 - Total expected registration feeds into budget projections
 - Advertise expected registration to attract vendors
- Abstract submission is not an obligation
 - Typically about ~30% of abstracts are later withdrawn
 - So about 60-80% of **submitted** abstract number is a reasonable expectation for delegate registration
 - Also use DOE \$500k limit to project max DOE attendance
 - (This may be a historical bias; post-COVID data is unclear.)
 - About 10% of total abstract number are usually candidates for the student poster session

Conference Tasks: LOC (2)

- In parallel to SPC, the LOC is organizing many logistic and budgetary details for the conference
 - Editorial board
 - JACoW Team Meeting, training, organize team (~6 months out)
 - Graphic identity and web development
 - Bags, posters, handouts, program booklet
 - Venue layout and contracting
 - Including IT and site visit for delegate flow, mix with industry
 - Including AV and speaker/stage layout, acoustics
 - Catering and side meetings
 - Coffee breaks, banquet, chair's cocktail, WISE...
 - Industrial registration (early to develop budget)
 - Delegate registration
 - SPMS/Indico should be used for registration if at all possible!
 - Student program (poster session and grants)
 - Companion program and registration, Tours

(Interlude: Student Session Organization)

<http://toddsatogata.net/studentPosterOrganization.html>

- Student sessions are a large part of large conferences
- Student Program
 - Acquire funding for and administer participation grants
 - Work with grant committee to determine awardees
 - Work with LOC to determine disbursement
 - Organize Sunday training session, secretary assignments
 - Coordinate student participation with Presentations Manager
- Student Poster Session
 - Acquire funding, certificates for student poster prizes
 - Organize (with LOC) student poster session (usually Sunday)
 - Gather abstracts (grant winners must participate)
 - Organize SPC/OC/SPCC members as judges
 - Assign poster codes, produce poster session booklet
 - Organize rubrics and run judging session
 - Organize prize delivery at prize session (usually Thursday)

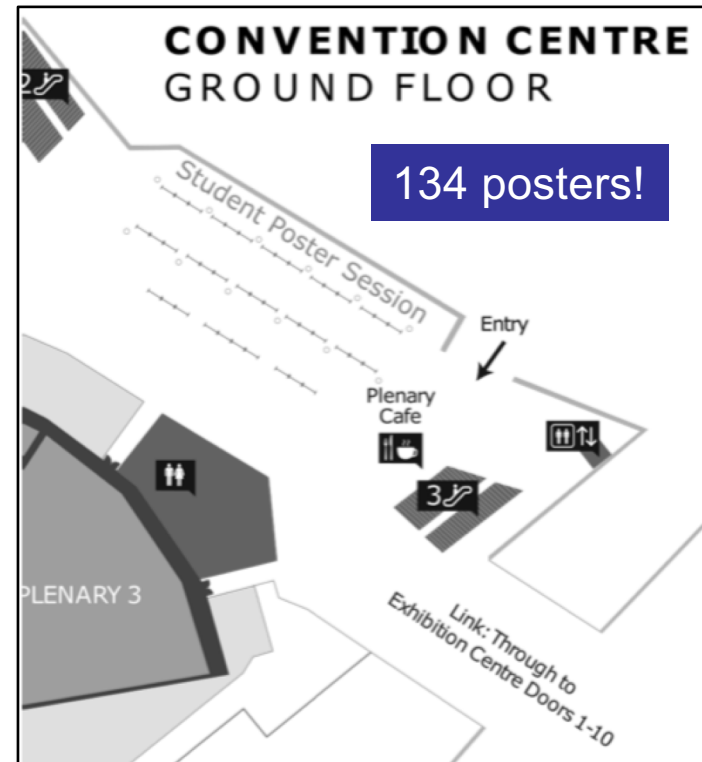
(Interlude: Student Poster Session, IPAC'19)

The Tenth International Particle Accelerator Conference

STUDENT POSTER SESSION GUIDE



19 - 24 May 2019
MCEC
Melbourne Australia



(Interlude: Industrial Program)

- Industrial exhibitors contribute a **large** portion of large conference budgets
 - The Industrial Exhibition Manager is a very important role
 - Coordinates everything from registration to move-in and move-out, booths, electricity, network, carpeting, etc
- It's very important to keep exhibitors happy
 - Provide a venue, receptions, and poster sessions that move delegates among exhibitor booths
 - Provide announcements of raffles, special events, ways for industrial exhibitors to engage delegates
 - Have conference and SPC chair (and family?) visit booths

(Industrial Program/Coffee Break: IPAC'19)

Posters

Booths

Posters

- Good mixing among delegates and exhibitor booths
- Coffee and refreshments can force traffic through booths
- Helps to have semi-enclosed booths for vendors

(Interlude: Social Program)

- Coffee breaks should provide good opportunity for mixing
 - See previous photo!
- Conferences can have few or many receptions
 - Welcome reception (Sunday evening, with student poster session)
 - Professional organization receptions
 - e.g. Meet the APS Editors at PAC/IPAC conferences
 - Women in Science and Engineering
 - Conference Banquet
 - Include entertainment or some interactive opportunity
 - e.g. Calligraphy lessons at IPAC'13
 - e.g. Aboriginal music and dance at IPAC'19
- Companion programs and tours
 - Interesting cities often offer good deals for large conferences



Conference Tasks: JACoW

- What is JACoW's role in all this?
 - SPMS/Indico
 - Organizes scientific program and registration functions
 - JACoW provides guidance in SPMS/Indico function and use
 - Scientific Secretariat
 - Coordinates many SPC/LOC activities
 - Implements many activities in SPMS/Indico
 - Contacts JACoW for technical support (e.g. registration forms and payment module)
 - IT integration
 - Website scripts provide dynamic view of conference activities from metadata in SPMS/Indico
 - Interactive industrial registration, delegate registration lists

Conference Tasks: Nearing the Conference

- A few months before the conference
- SPC
 - Mainly ballistic, though some chairs and talks may change at the last minute
 - Scientific program must be fixed in time to print program guide
- LOC
 - Final identification of conference team and roles
 - Detailed arrangements for visiting staff (e.g. editors)
 - Order final conference materials (booklets, bags, badges, ...)
 - Final confirmation of all support contracts (IT, booths, ...)
 - Dry runs of certain activities can be very helpful
 - Particularly with regards to transportation and logistics

Conference Tasks: Showtime!!

- Where the rubber meets the road
- This is covered very well in many other presentations at our Team Meeting
 - e.g. prepress proceedings available transparently now
- There should always be a closeout meeting near the end of the conference
 - Includes LOC members, future organizers in series
 - Prompt documentation of lessons learned, observations
 - Produce written documentation of these lessons as part of conference deliverable
- Remember to take and gather conference photographs
 - Or even hire a professional conference photographer

(Conference Roles: Editors)

May Be
Evolving

- Editorial Board
 - Develop/document editorial standards for editors
 - Organize and invite editorial team; plan editorial rom
 - Participate in JACoW Team Meeting and training activities
- Editor / QA
 - Process paper contributions according to editorial guidelines
 - Perform quality assurance on processed papers
 - Have access to Editorial module in SPMS/Indico
- Transparency Editor
 - Process transparencies for talks to PDF, including animations
 - Have access to Presentations module in SPMS/Indico
- Author Reception
 - Interface with delegates for editorial questions
 - Check title/author lists vs SPMS/Indico, gather copyright forms

(Conference Roles: IT)

May Be
Evolving

- Conference IT
 - Set up, monitor, and break down network connectivity
 - Specify connectivity requirements to venue/IT vendors
 - Isolate editorial network from delegate network
 - Support network for presentations management/delivery
 - Participate in JACoW Team Meeting and training activities
- Conference Webmaster
 - Maintain conference website, provide access and updates
 - Integrate with JACoW dynamic content (scripts)
- SPMS/Indico DBA
 - JACoW SPMS/Indico database administrators
 - Can provide technical help with SPMS/Indico (and even development) before and during conference

(Conference Roles: Floor Managers)

- Presentations Manager
 - Organize and run speaker ready room
 - Ensures presentation sessions run smoothly
 - Coordinate chairs and student secretaries in sessions
 - See Vincent's talk Thursday for tons of useful guidance
- Poster Session Manager
 - Organizes boards, numbering, layout
 - Ensures posting material is available
 - Ensures boards are prepared every morning for new posting
 - Addresses layout issues
 - Organizes "poster police"
- Industrial Exhibition Manager
 - Ensures industrial exhibitors are happy
 - Infrastructure: light, internet, electricity, chairs, tape, etc

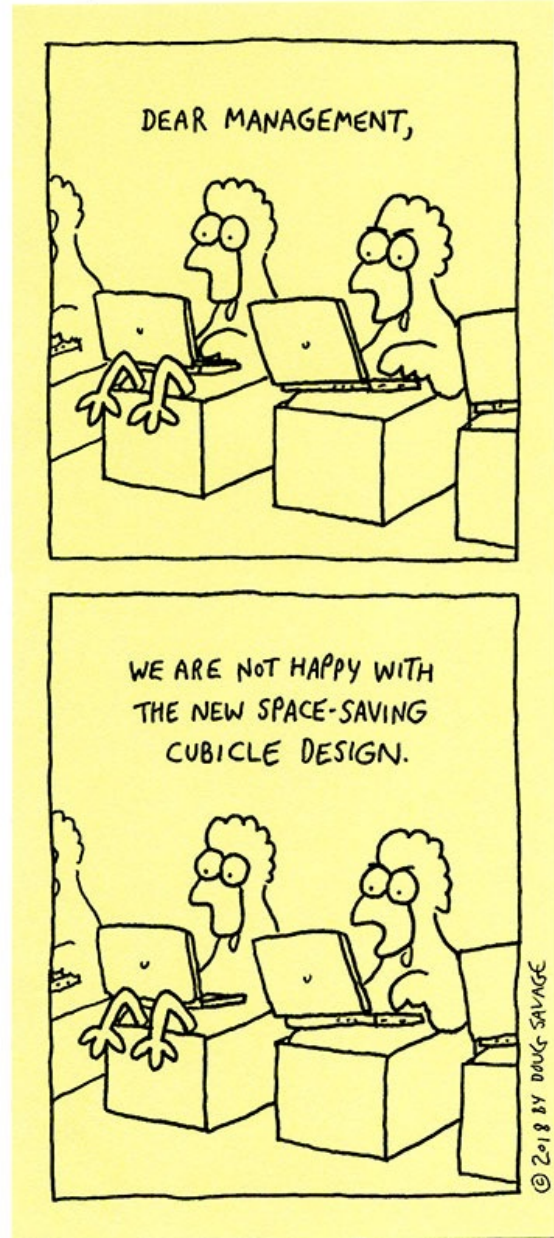
Conference Chronology: Post-Conference

- Produce and publish proceedings (editorial board)
 - Including Preface from conference, SPC, LOC chairs
 - Including selected photographs
 - **Do not let late authors control your proceedings delivery**
- Close out conference financials
- Update website with final conference information
 - Including attendance and processing statistics
- Treat your local volunteers to something nice
 - e.g. employee recognition at BNL after NA-PAC'11

Feedback Is Necessary To Learn (but not too much)

Savage Chickens

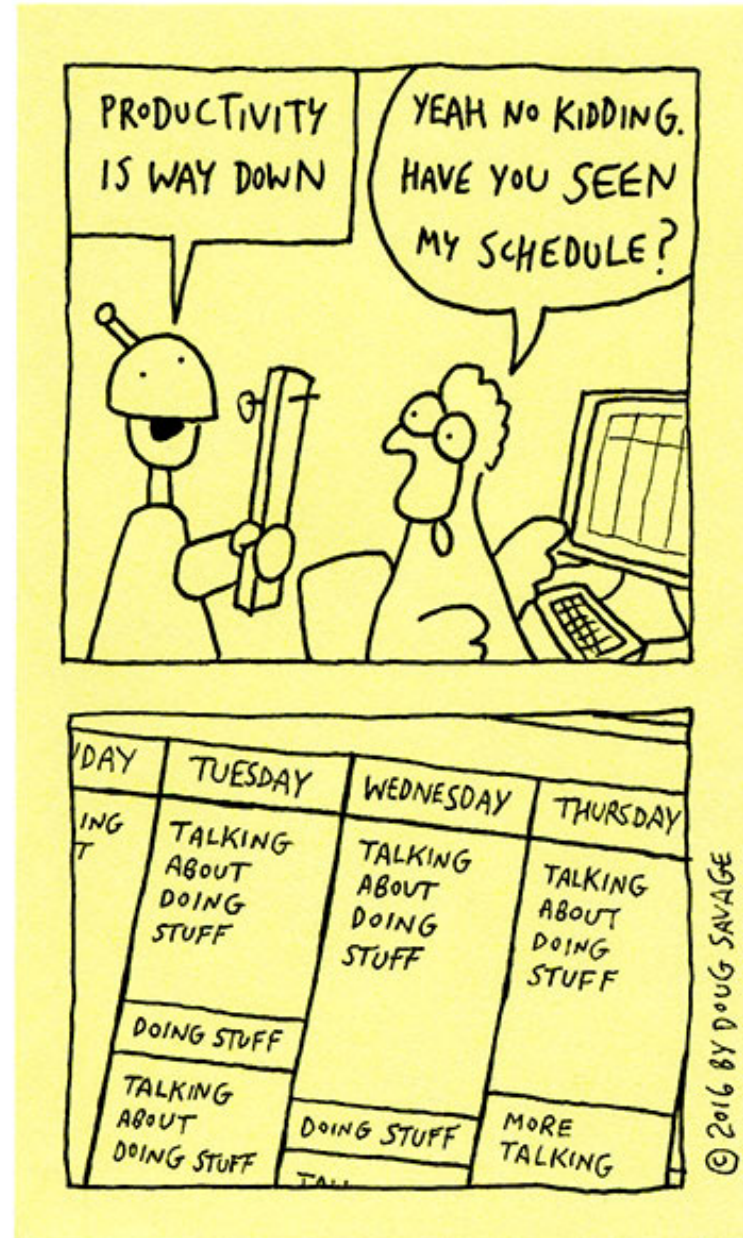
by Doug Savage



www.savagechickens.com

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The JACoW Family Handle Stress Well!



- The JACoW leadership method for stress reduction (2009)