



XXXI SCAR Delegates Meeting
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Agenda Item: 10.7
Person Responsible: Mike Sparrow

Management of SCAR Open Science Conferences

Executive Summary

Title: Management of SCAR Open Science Conferences

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Relevant URLs or references to other reports: www.scar.org; Guidelines for Organizers of Biennial SCAR Meetings (http://www.scar.org/members/17hostguidelines_final.pdf)

Introduction/ Background: Working Paper WP 29 at XXX SCAR in 2008 proposed standardization of the management of the SCAR Open Science Conferences (OSCs). At the request of the Delegates this proposal was re-evaluated and refined. At the EXCOM meeting in 2009 this proposal was reviewed and updated as WP23. A new and improved model for managing SCAR's OSCs is provided.

Recommendations/Actions and Justification: The Secretariat, in consultation with an International Scientific Organizing Committee (ISOC), will manage the process of assembling the Science Program for the Open Science Conference. This ensures that abstract submission and handling is efficiently handled by a standardized process from Conference to Conference. The Local Organizing Committee (LOC) continues to assume responsibility for all local arrangements and financial aspects of the Conferences. Delegates are requested to approve Secretariat plans to partial, in-house management for SCAR OSCs by developing an on-line, automated system.

Expected Benefits/Outcomes: SCAR Open Science Conference management will be standardized increasing efficiency, reducing cost and minimizing the risk of failure.

Budget Implications: At this time no financial investment is required assuming that the current web site can adequately provide the on-line services proposed. If an investment in commercial software is necessary competitive bids would be procured at that time and alternatives assessed.

Management of SCAR Open Science Conferences

Background

In 2010, the fourth SCAR Open Science Conference will have been staged in Buenos Aires, Argentina. These Conferences are widely seen by the scientific community as one of the most successful and beneficial outcomes of the SCAR re-structuring. Therefore, it is important that SCAR devise a workable and efficient model to manage this key SCAR event. The SCAR Open Science Conference and associated meetings have become larger and more complex over the past 8 years. These meetings are expensive to host and managing them has become a year-round task for SCAR Secretariat staff. As a major SCAR event, there is risk to SCAR's reputation should a major failure occur. It is important to: develop an improved model for managing these meetings, to standardize the process, reduce the risk of failure, ensure that responsibilities are understood by hosts, and achieve the greatest benefit from this activity. In order to guarantee success and reduce risks, SCAR must assume greater ownership of the management of these activities.

In 2008, at XXX SCAR, Working Paper WP 29 outlined one approach to managing the SCAR Open Science Conferences (OSCs). Delegates were cautious about the Secretariat assuming management of the meetings due to the financial and Secretariat workload implications and asked that the plan be carefully assessed, especially in regard to costs. At the EXCOM meeting in 2009, this plan was updated in WP23 (see appendix). The original recommendation that SCAR employ staff to manage meeting registration was replaced by a proposal to jointly manage the meetings with the host rather than assuming full responsibility (and associated costs). To begin the process, the Secretariat proposed the purchase of a commercial software package to manage abstract submission and approval, registration, and payment. At that time the cost for software was estimated to be \$US 10,000-20,000. Additional costs include staff time to manage the software and process. Further intercessional discussions have led to further revisions to the plan that are presented here.

Revised Open Conference Management Plan

In devising a new model to manage the SCAR Open Science Conferences, the overall Conference process can be separated into three, distinct activities: 1) assembly of the science program, 2) management of local arrangements, and 3) handling of financial aspects. The proposed model increases participation of the SCAR Secretariat, ensures equitable division of responsibilities between SCAR and the host, and reduces the risk of failure. The model includes an International Scientific Organizing Committee (ISOC), a Local Organizing Committee (LOC), the host country, and the SCAR Secretariat.

Assembly of the Science Program

SCAR will assume full responsibility for assembling the science program. SCAR has always named and managed the International Science Organizing Committee (ISOC) and this will be expanded to all aspects of managing assembly of the science program. The ISOC in consultation with the Secretariat is tasked with determining the Conference themes and sub-themes, soliciting and reviewing abstract submissions, recruiting session chairs, and encouraging community participation. In the past, assembling the science program has been managed by SCAR or jointly managed by SCAR and the Local Organizing Committee (LOC). It is proposed that the SCAR Secretariat assume full responsibility for assembling the Science Program and that the LOC have representation on the ISOC to ensure communication. SCAR Secretariat staff will organize and manage the entire process including empanelling the ISOC (including selection of the Chairs[s] and membership); setting the Conference theme and sub-themes; the abstract submission, review, and selection (oral and poster) process including submission; and assembling the final science program. This allows standard procedures and timelines to be established that are invoked each time. The abstract system will be on-line and include automated notifications of abstract receipt, acceptance and scheduling. This will reduce confusion and establish expectations in the community about when abstracts will be solicited and decisions communicated. It also allows for early assembly of the Science Program to more easily address issues related to deployments to the field, late requests for special circumstances, and early notification of abstract status to support applications for travel funds. A draft system for abstract handling is being tested at the SCAR

Secretariat. Those familiar with meeting planning will be consulted to establish the fields required for an on-line submission form (e.g. abstract, name, session, oral or poster). The system will allow for on-line review and assignment of abstracts to sessions to assemble the program. The abstract system on the SCAR web page will be directly linked to the Conference web site managed by the Local Organizing Committee (LOC). The link will be seamless as SCAR domain names can be linked to external websites. Established formats (abstract content and length, poster dimensions, etc.) will be reviewed and adopted so they are the same each year and provided on-line. Timelines will be established that take into account various constraints but once determined they will be adopted and uniformly implemented and enforced. This will afford stability and predictability to the process so people can plan to participate and submit abstracts far in advance of the meetings.

Local Arrangements

Management of all local arrangements remains the responsibility of the Local Organizing Committee (LOC). The LOC confers with the SCAR Secretariat on these issues to ensure that the facilities and support are adequate and a Guide is provided (http://www.scar.org/members/17hostguidelines_final.pdf). The LOC is most familiar with the venue and local vendors and thus most naturally in charge of these details. The most important interface between the Secretariat and the LOC will be matching the Science Program to the venue and this will be done in close consultation. A member of Secretariat should also be a member of the LOC (preferably the SCAR Executive Director). These responsibilities remain unchanged.

Financial Aspects

The local host assumes financial responsibility for the meetings and is responsible for managing the financial aspects of the Conferences (and associated meetings) in consultation with the SCAR Secretariat. This includes booking local facilities, entering into contracts with local vendors, providing audio-visual support, arranging entertainment and social activities, and all other local arrangements. In particular this includes setting and collecting registration fees for the Conference. As each locale will have unique financial circumstances the exact details are to be negotiated with the SCAR Secretariat to ensure that the goals of SCAR for these meetings are met. If deemed acceptable and/or necessary, SCAR may assume some financial management responsibilities but this does not relieve the host of full financial responsibility for the meetings. SCAR will negotiate a surcharge on registration fees to fund travel grants for students and early career scientists in the form of reduced registration fees or travel grants managed by SCAR. There may be SCAR costs associated with social and recognition events that need to be recouped in registration fees and these will be negotiated on a case-by-case situation.

Recommendation: Delegates are requested to approve a new model for jointly managing the SCAR Open Science Conferences which includes a greater partnership between SCAR and the local host and in-house SCAR management of some aspects of the meetings.

Appendix – WP23 from EXCOM 2009

Action Required

EXCOM is invited (i) to note further progress in development of plans to run SCAR meetings from within the Secretariat so as to keep costs of meetings down, (ii) to suggest changes as needed, and (iii) to approve plans for implementation in 2012.

Background

At XXX SCAR in 2008 the Executive Director presented Working Paper WP 29 to stimulate discussion on standardising the arrangements for OSC, on lowering the cost of the registration fee, and on the frequency of OSCs. Delegates agreed this was a very important topic that merited extended debate. WP 29 suggested that we need to examine a number of different systems to find one that would work for us with little or no adaptation. Delegates agreed that it would be difficult, starting in 2009, to spin up a system ready for the OSC in 2010. 2012 is a more realistic target.

Delegates agreed with the principle that SCAR could hire someone to manage the meeting registration and associated arrangements provided that this was self-sustaining and cost neutral. They also agreed that the registration fee could be set in such a way as to allow some small ‘profit’ element that could be used to invest in travel to the OSC by young scientists.

The progress report below addresses these issues.

In addition, Delegates agreed with the paper’s suggestion that full costings should be obtained from AWI, AAD and AARI so that it was clear to what extent the host organisation subsidised the three previous meetings in cash or in-kind (e.g. with staff), and how the registration fee had been used, and that these costings should form the basis for a revised paper for EXCOM in 2009.

That work has not been done because there simply has not been time and because looking backward in that way seemed less relevant in the context of trying to find a workable in-house system for the future.

Progress Report

The International Glaciological Society (IGS) has faced much the same problem as SCAR has in managing its meetings. To solve the problem it has recently moved to a comprehensive Member Relationship Management (MRM) system. This manages their membership database. It looks both more advanced and at the same time more user friendly than the SCAR database management system. It offers the advantage that as well as having our routine contacts we could add to them all the individuals who register for meetings, hence greatly expanding our contacts network. We have not been able easily to do this in the past, because our three previous conferences have been managed by three different organisations independently from the Secretariat and its database.

The MRM system incorporates an in-house management (EM) system that enables individuals to log on from outside, register for meetings, and make payments through a secure system directly into the IGS bank account. The system is being trialled with the Glaciology Conference that is being organised for Newcastle this July. The payment system is SAGE, and is separate from the EM system. IGS also has its own abstract submission system, which was devised for it by the same people at SPRI who devised the SCAR web site. It is thus a no-cost system, and happens to be highly user-friendly. It is connected to the proprietary EM software, enabling IGS easily to manage all aspects of an event from registration and payment, to abstract submission and approval, to arrangement for field trips and ice-breakers, to the printing of name tags, to the burning of CDs with conference programmes and abstracts. This is what we have been looking for.

In summary, the IGS database and meetings management system has four main components:

- (i) The Proprietary MRM member management database system;
- (ii) The Proprietary EM software;

- (iii) The SAGE payment software, enabling people to pay using credit cards (this could also be useful for our merchandising concepts – buying SCAR ties, mugs etc.);
- (iv) SPRI software for submission and management of abstracts for meetings.

The MRM system also incorporates an accounting system that is clearly much more advanced than our simple (and slow) Excel-based accounting system. The MRM system has the advantage that it incorporates a portal that would enable users to link directly to it through the SCAR web site, thereby obviating the need for Secretariat staff to spend time handling payments, paper registrations and so on. Given the introduction we have had to the MRM system by IGS it would seem worthwhile for SCAR to investigate acquiring appropriate parts of the MRM system to improve our overall efficiency (databases and accounting), as well as to facilitate our in-house management of major SCAR meetings. We had imagined (in paper XXX-WP29) that event and abstract management might require half a person time for the course of each year. Based on the IGS experience that would appear to be a significant over-estimate. Once an individual has been trained it should not take much time to manage such a system. Such a system, once developed, could potentially be available for any SCAR meeting, which would take the chore out of meeting arrangements for local organisers – thus improving our service to the community. The IGS MRM software is provided by Technology Services Group (TSG), which they found in a competitive process that we might not wish to repeat. It would probably be an advantage for us to use the same system, since we can then benefit from IGS's learning experiences. IGS has loaned us a set of TSG brochures that will be made available at the EXCOM meeting.

At this point in time it is not possible to cost these activities, however it would seem sensible to add a provisional sum of \$10,000 to the 2010 budget to cover possible start up costs so that we have a system being built during 2010-2011 ready for implementation for the 2012 meeting. IGS's total costs were significantly greater, but their version of the MRM package included many bespoke add-ons that we would not require. Though it is not cheap, we would benefit from getting charity rates. Such a system would be expected to pay for itself in a relatively short time through minor loadings on registration fees. It should help us to achieve the goal of low cost meetings in a relatively short space of time.

EXCOM is requested (i) to endorse the Secretariat's exploring options and costs with TSG, during 2009, and (ii) the inclusion of \$10,000 in the 2010 budget to cover possible start up costs for installation of such a system so that it can be readied for the 2012 meeting (there is an implication that further costs will be needed in 2011 to complete what is started in 2010).

At this point in time it is not possible to say what the potential drain on staff time may be from installing such a system. We will not know that until we have begun working with TSG. However, while IGS found that significant time was required to learn the system, it now requires very little time to manage it. The previous paper on this topic (XXX-WP29) goes into some depth on the duties expected to be involved on the part of a staff person to arrange meetings, and on the question of costings, so we do not repeat those points here. However, it is interesting to note that IGS achieves a lot of what is required by relying on volunteers from among the retired glaciologist community. Our discussions with IGS reinforced the validity of the statement from paper XXX WP29 that:-

“Once a standardized, fully automated, on-line system is created, the workload of staging a meeting would be significantly reduced. Standard procedures would lighten the workload for all involved and an automated system will greatly reduce the labour intensive portions of the process, such as abstract submission, handling and review. There may be some up-front costs to develop this system. Moving most of the programme management to the SCAR web site will have a secondary effect of getting even more people to log into the SCAR web site rather than a specially created onetime site managed by the local organizer and which is discontinued after the meetings. The SCAR web site based page would also be the “go to” location, avoiding having a new URL for every conference.”

Having such a system in place would (as stated in XXX WP29) allow us to package our cycle of scientific meetings as an organized system of scientific forums to promote and enhance Antarctic Science. This would be an effective advertisement and promotional tool for SCAR and the basis for a long-term strategy for these types of activities over the next 10 years.

In talking to IGS we found no evidence to support the view raised by one Delegate at XXX SCAR that experience from EGU suggested that this would be a complicated and expensive business for SCAR; quite the contrary.