Event coordination for an open-source software project

Event coordination for a open source software project can represent major share of the project's outreach and education effort allocation. NCSA's Cybersecurity Division has hosted or coordinated numerous events for the Bro Project. Below is a detailed list of tasks and lessons learned from coordinating events at NCSA and other venues.

- **Dates**
    - Confirm dates from leadership team
    - Event usually starts on a Tuesday and ends on a Thursday at noon
- **Location**
    - Confirm location from leadership team (more details about venue below)
    - Confirm max # of attendees (usually based on venue)
- **Budget**
    - Record known expenses as they appear
    - Project finance managers might require a budget but it's needed regardless, to keep track of costs
- **Registration**
    - Confirm ticket cost with leadership team (including "early bird")
    - Set up registration page (We used Eventbrite)
    - Include max # of attendees/tickets on the form (the venue will often determine how many tickets may be sold)
    - Create "early bird" tickets
        - make sure unsold "early bird" tickets are moved to regular ticket quantity after it expires
    - Make sure cc processing fees are included in the ticket price (i.e., revenue is a few dollars less in order to show a round number in the cart)
    - Fill in the event details
    - Include checkbox for sharing registrant's name and email with sponsors
    - Include dropdown for t-shirt size, to help with ordering
    - Create promo codes for internal staff and sponsors
    - Have internal staff register early to test the form
        - Make sure staff attending registers
        - Make sure leadership team attending registers
    - Add sponsors to registration confirmation page as they are confirmed (if possible)
    - Periodically download registration data and send to leadership team
- **Event page**
    - Use previous event pages as a guide
    - Include dates, whether food will be served (some attendees may need this spelled out due to employer restrictions)
    - Sponsorship
        - Add sponsors as they are confirmed
    - Call for Presentations (more details listed below)
        - Make sure you have a due date
    - Registration
        - include refund text, Ex: "Full refunds, less a $30 processing fee, will be issued up to 50 days after registration. Unfortunately we are unable to issue any refunds beyond 50 days after a registration. Four weeks prior to the start date of the conference, we will be unable to offer any refunds."
    - Agenda
        - Add note that it's coming soon, post when ready
        - Add abstracts to the agenda via links
        - More notes on building Agenda below
    - Wireless access
        - Follow up with whoever is hosting the event to get instructions for connecting to wireless
    - Hotel information
        - Post hotel info including cost/night
    - Transportation information
        - Add airport details
        - Add train/bus details (if applicable)
        - Parking
            - Confirm parking instructions with event venue
            - Include links to online payment/parking app if available
            - "(insert venue and event/project names) are not responsible for parking violations. Registration to (event name) does not include free parking."
    - Code of Conduct
        - "(Insert event name) is dedicated to providing a harassment-free conference experience for everyone. We do not tolerate harassment of conference participants in any form. Conference participants violating these rules may be sanctioned or expelled from the conference, without a refund, at the discretion of the conference organizers."
    - On website: Add links to the event page in the side panel and under Events
- **Public communication**
    - Announce "save the date" with event location and dates
        - Usually about 6 months before the event date
    - Post to blog, mailing lists, Facebook, and Twitter
    - Announce registration when it is ready
    - If possible, create an event email alias and forward registration notifications to the alias, monitor it for customer emails from the registration page
    - Periodically announce sponsors, other details
    - Try to group event updates in the same email to avoid spamming your community
    - After the conference: Announce when slides and videos are posted (there will always be immediate requests for these materials – it can take up to a month to actually get done)
- **Venue**

- One year+ prior to event: Ask community for volunteers to assist with hosting the event. Ideally, the event will be hosted at venue on a college campus (NCSA, TACC, MIT) to help manage costs. Venue sponsors may receive discounts or waived fees for rental or A/V expenses. The location should be within walking distance of a hotel, restaurants, and other amenities.
- Determine if venue meets requirements
  - Required:
    - Can host up to 250 attendees
    - Reasonably accessible by air
    - Point of contact at site to assist with logistics (event planner, if available)
    - Low cost for hosting
    - Good video/slide recording capabilities
    - Good wifi/networking
    - Permission to set up registration table/swag the day before event
  - Desirable:
    - Ability to host a reception (either at the site or nearby)
    - Restaurants and hotel within walking distance
    - Storage at event site for sponsors and event team to put items overnight during conference
    - Storage for event team to ship swag items ahead of event date (either at the site or nearby office)
    - Person to assist with registration and handing out swag the morning of event
  - Other notes:
    - What is the conference venue set up? Is it an an auditorium or tables?
    - Send an address of the proposed location so we can research the area.
- Reserve venue location
  - Any contract signed must be through the purchasing dept (might require a deposit)
  - Make sure all rooms that will be used are included in the request (auditorium, atrium, and extra break rooms)
  - Extra break rooms (one with AV feed, one quiet) has been very successful in the past
- Reserve block of hotel rooms

  - Reserving a room block can help cut costs by negotiating a cheaper nightly rate with hotel management but assumes some risk if not all the rooms are reserved
  - Some hotels will add more blocks if all the rooms are taken, make sure you discuss all the options before committing to a block
  - Any contract signed must be through purchasing dept
  - Periodically check in with hotel management to track how many rooms have been booked, email the mailing list and remind people to book their travel if there are still rooms left
- AV services
  - Request assistance with recording, projecting, setting up mics
    - Request podium and wireless mics

      - you might need to pay for extra mics but it's worth the expense
    - Panel talks will need additional mics and tables/chairs
  - Ask AV staff if they have any notes or requirements
  - Inform AV staff of any presentations that will not be recorded
- Catering
  - Make contact with catering manager (might require a deposit, purchasing dept signs contracts)
  - Review potential menus
  - Request vegetarian yogurt if possible, request eggs for continental breakfast (if doing that)
  - Order food:
    - Tuesday: breakfast, morning snack is items leftover from breakfast, lunch, afternoon snack, welcome dinner/hors d'oeuvres reception with alcohol
    - Wednesday: breakfast, morning snack is items leftover from breakfast, lunch, afternoon snack
    - Thursday: breakfast, morning snack is items leftover from breakfast, lunch (usually grab & go boxes)
    - Make sure there's coffee during afternoon break
  - Confirm alcohol may be served at venue
  - Confirm caterers provide clean linens for dining tables
  - Contact catering about 1 week before with registration numbers
- Confirm venue has enough tables and seating for breaks and meals. If not, caterer might be able to provide.
- Request extra tables and chairs for registration and sponsors (tables usually 5' or 6' long)
  - Make sure venue has tablecloths for these tables, purchase if needed
- Contact facilities manager
  - if furniture needs to be moved around
  - when to expect shipments from sponsors
  - where to store sponsor materials and swag
  - request help with event signage
    - is there a digital display? find coordinator's contact info and send them images, sponsors, and agenda
  - extension cords or access to power outlets
- **Badges**
  - Buy badges
  - Comb through registration list and modify badge list (correct if all lower case, shorten org name if possible, fix obvious typos in name)
  - Design badges (we used a free app by Avery)
  - Print badges the week before event
    - Stuff badges into plastic covers
    - Print extra blank badges for last-minute attendees
  - Two days out: Print additional badges as more registrations come in
  - You may need to come in early the 2nd day to print more badges (some attendees don't want a handwritten badge, or there was a mix up /typo)
  - Have a heavy duty marker available to write names on badges
- **Swag**
  - Determine what you are offering (shirts, bags, mugs)
  - Design shirt/mug
    - Take advantage of in-house designers if available, ex: NCSA's Public Affairs office designed 2017 mug and shirt
  - Get approval from leadership team

- Order about 6 weeks before the event (proofs may require some back and forth before final approval)
- Find a place to store swag (it will be many boxes)
- Ship unclaimed swag back to home office (if applicable)
- Find someone to help with disposing the cardboard boxes, there will be many and there might be rules about where to put them

- **CFP**
  - Work on draft for CFP, get approval from leadership team (sample text listed below)
  - Announce CFP (preferably with any save the date email, etc)
    - make sure you have a due date
  - Collect responses

    - Manage CFPs in some sort of shared database or repository: We used JIRA, EasyChair is also an option
  - Assign submissions randomly to leadership team members
    - Must give them enough time to review (~2 weeks)
    - Each submission must be reviewed by at least two LT members
    - They vote (strong accept, weak accept, weak reject, strong reject) and explain why (a paragraph or so)
    - Reviewer can add comments they want to send to the speaker (Coordinator sends as anonymous feedback)
  - Respond to speakers about 6+ weeks before so they can make travel plans
  - Contact declined submissions
  - Announce speakers on mailing list, Twitter, Facebook
  - Send any AV instructions to speakers (projector dimensions, etc.)
  - Make sure confirmed speakers have registered
  - Get email permission to record speakers
  - Example CFP text:
    - "BroCon '17 is accepting presentation proposals. We are looking for talks to represent the many applications of Bro. Suitable topics include, but are not limited to:
      - as a tool for solving problems;
      - interesting user stories, solutions, or research projects;
      - a postmortem analysis of a security incident, emphasizing Bro's contribution;
      - the value Bro brings to your professional work;
      - and, using Bro for more than intrusion detection.
      - Please, no product presentations
    - Criteria for evaluating proposals include whether the topic is applicable to multiple types of organizations, gives people ideas to take home and use, can be understood by a broad audience, or is novel to many in the audience. Scrolling through our may provide some insight into the types of presentations we YouTube Channel wish to feature. Plan on limiting your talk to 30-35 minutes with an additional 10 minutes for questions/comments.
    - Send abstracts (max 500 words) to:
      - info@bro.org
      - Subject: BroCon 2017 Call for Presentations
      - Submission due date:
      - Friday, June 9th
      - Target date for announcing speakers: Friday June 30th
      - CFPs are selected by the Bro Leadership Team:

        - (List leadership team members)"

- **Lightning talks**
  - We coordinated lightning talks in 2017, 5 minutes per speaker
  - Lightning talk abstract:

    - "Have you contributed a package to the new Bro Package Manager? Or do you have something interesting to share related to Bro that doesn't fit into a traditional presentation? Great! We'd love to hear from you. We have scheduled a 45-minute session for lightning talks. Be prepared to quickly identify your point, demonstrate it, and provide a link or contact info for later follow-up. We'd like to accommodate as many talks as possible so please limit your talk to less than 5 minutes. No commercially incentivized presentations, please."
  - Email to mailing list:

    - "Hello Bro Community, In order to queue up requests to speak at the BroCon Lightning Talk session, we've created a Google form: (insert link) We ask for your name, email address, organization, talk title, contact info, and a link to 1 or 2 slides to help us generate the slide deck.
  - Request speakers put slides on shared Google slides document (saves time switching computers)

- **Agenda**

  - ~2 months out: Start asking project team members to volunteers to present and what topic

    - Usually these talks are about new development, where the project is headed, interesting applications of the project
  - Build agenda after CFP submissions have been approved
  - Share agenda for feedback from leadership
  - Make sure breaks are long enough (20-30 minutes, 90 minutes for lunch)

- **Sponsorship**

  - Benefits of sponsorship: Sponsorship gives sponsors access to community members and vice versa, funds can help pay for items not covered by the grant (alcohol, swag), extra funds helps keep ticket costs low without burning down the grant.
  - Challenges with sponsorship: Communication back and forth with sponsors can be laborious, identify a point of contact to keep communication on track. Writing a prospectus will help clearly define what is included with sponsorship and sets expectations. A prospectus also provides sufficient documentation for the sponsor to get approval from their management to grant funds.
  - Sample sponsorship prospectus
  - Review and update sponsorship prospectus, send to leadership team for approval
  - Announce sponsorship opportunities – either with save the date or other announcement mailing

    - Distribute prospectus to archived list of sponsors (keep a list of interested sponsors for future events)
  - Begin collecting/archiving interested sponsors (we used JIRA)

- Sponsors must review and sign agreement (included in prospectus)
- Forward agreement to purchasing/finance dept for invoicing (usually takes 30 days)
- Request logo from sponsor, post to website
- Send sponsorship promo code for # free tickets

  - Make sure sponsors register before you run out of tickets
- Give sponsors "shout out" on social media
- Be available to sponsors for questions about the venue or logistics
- Before and after conference: send sponsors the list of attendees who opted in to share contact info

- **The day(s) before the conference**

  - Print registration lists (2 copies so someone can assist with checking in)
  - Last minute badge assembly
  - Gather highlighters for marking off registration list during check-in
  - Visit venue, do as much table setup as possible
  - Prepare swag (the day before if possible, or early the first morning of the conference)

- **The first day of the conference**

  - Finish setting up
  - Keep registration lists private, not out for passersby to see/photograph
  - Check-in attendees, distribute swag
  - Request someone sit at registration to check-in late arrivals
  - Be prepared to help a few attendees who show up and learn they aren't registered (either their purchasing office never bought tickets, or the tickets are in the wrong name). In the case of purchasing office not buying tickets, attendees usually buy them online in the lobby and deal with their purchasing issue later.
  - (The first day or after) Record attendance in a spreadsheet to keep track of it

    - Occasionally people will request proof of attendance, I sent an email confirming attendance but a more formal process may be necessary

- **During the conference**

  - Emcee or assign an emcee, introduce speakers, breaks, and other event logistics
  - Get water for speakers (either from caterer or event coordinator)
  - Take photos of speakers

    - Post to social media
  - Check in with catering managers and event hosts
  - Notify attendees when breaks are over to get them back into the auditorium (Ex: Singing bowl, ringing a bell)

- **Survey**

  - Make survey (we used Google forms):

    - "Thanks for attending BroCon '17! Please take a moment to fill out this brief survey.
    - 1. Rate the value of presentation topics offered this year: (scale 0 - 3)
    - 2. Rate the quality of the presentations: (scale 0 - 3)
    - 3. Comments about the presentations (optional): (paragraph)
    - 4. Rate the organization of the conference (event venue, communication, agenda updates, etc.): (scale 0 - 3)
    - 5. Rate the food (breakfast, lunch, reception dinner): (scale 0 - 3)
    - 6. Comments about the event preparation, execution, and food (optional): (scale 0 - 3)
    - 7. Give a brief description of how you use Bro (optional): (paragraph)
    - 8. Are you currently using Bro in a production setting? (yes / no / I plan to / other)
    - 9. Rate your skill level with Bro: (many years experience / I use it but not an expert / I am a beginner / I do not use Bro)"
  - Distribute on the last day of the conference
  - Close survey ~1 month after BroCon, send results to Bro team. Remind people to take the survey.

- **Videos**

  - Collect videos from AV service
  - Some videos may need post production editing, based on how they begin or whether presenter displayed information that should be private (IPs, etc.)
  - Post videos to YouTube, include tags, abstract, speaker name
  - Post links to agenda
  - Confirm with the speakers that you are posting approved content

- **Slides**

  - Collect presenter slides
  - Convert slides to PDF
  - Upload to website
  - Post links to agenda

- **Odd purchase requests**

  - You may receive a request to purchase tickets through a purchase order. Our registration form didn't accept purchase orders. You may need to put these people in contact with purchasing dept to work out some method of payment that satisfies both parties.