iPres 2018 Handbook Installment

This is the 2018 iPres Organizing Handbook update installment.

There are many factors influence the organization of each iPres conference. Based on our experience and objectives in 2018, we wanted to make this a living document to be shared with the 2019 organizing team as well as future organizers, with the iPres Steering Group Examples for Sections

This is the 2018 iPres Handbook update. Many factors influence the organization of each iPres conference. Based on our experience and objectives in 2018, we wanted to make this a living document to be shared with the 2019 and future organizers, with the iPres Steering Group for inclusion in the wiki for that group, and with the broader iPres Community.

This document was informed by the guide that the iPRES 2016 Programme Committee generated. We began by working on a single, shared document that consolidated the documentation from 2016 and 2018 for the benefit of future organizers and for transparency within our community. We realized based on our cumulative experience with iPres that the organizing approaches adopted each year are distinct enough, so we determined that yearly installments would be most beneficial to future and potential organizers. Our document does not repeat the 2016 content and the examples they shared, but adds this documentation as our annual installment from the iPres 2018 Organizing Team.

In our installment, we focused on aspects of conference planning that we emphasized or introduced for iPres 2018 as well as things that were difficult or surprising. The iPres 2016 Operating Manual is particularly strong on EasyChair instructions and messaging examples. The accumulation of yearly organizing team installments should provide an invaluable resource for ipres conference organizers.

We are sharing the handbook to get feedback as part of the iPres Working Group's review and to encourage potential organizers on continents iPres has not yet visited to consider applying to host a future conference.

Table of Contents

Sections

1. Organizing Plan

A. Conference Culture

We adopted a number of core principles for iPres 2018. We committed to and took actions to ensure that we were as inclusive as possible. We share examples in other sections of the handbook, such as ensuring that we had a Code of Conduct, selecting a diverse group of reviewers, and providing the optional abstract review for paper submissions to encourage broad participation. Inclusion was also a factor in our conference scheduling, incorporating as many sessions as possible because presenters may be more likely to get travel support.

It was also important to us to be as green as possible by limiting printing to badge with few other exceptions, by providing hot and cold cups to avoid plastic bottles and other options, and encouraging sponsors to avoid printed materials. This was also a factor in deciding to have a digital poster session.

We hosted an open house for the iPres community that began a question and answer session that we hope will continue. We organized two discussions panels to celebrate the 15th anniversary of iPres that included questions about the future and governance of iPres. These discussion contributed to the establishment of an iPres Working Group to review the charter of the Steering Group and seek community feedback with results and recommendations to be shared at iPres 2019.

Code of Conduct

The *iPres 2018 Code of Conduct and Response Framework* was the first for iPres. We knew that we would have had a Code in place before we formed the Organizing Team. It became increasingly important for us to have a Code as we had frequent requests from potential attendees to have one and we learned months into our planning process that were was a perceived incident in a session the previous year. We would have done more sooner if we had been aware. We worked hard to ensure a safe and inclusive conference for iPres 2018, and to our knowledge we achieved that. We are not aware of any incidents and we passed a report of possible inappropriate behavior in one session to 2019 organizers.

The Steering Group added an agenda item to their 2018 meeting to talk about a Code of COnduct for iPres. There was general agreement that there should be a Code in place each year and some sense that the specifics may need to reflect local requirements and expectations in addition to some common iPres characteristics. The discussion will continue in STG.

We made sure that attendees, chairs, and moderators were aware of the Code's existence and enforcement. based on our experience, we would also add making sure that peer reviewers are explicitly subject to the Code, ensuring that reviewers are aware of that responsibility prior to the beginning of the peer review process and that the terms of the Code are included in instructional communications to reviewers. *We encourage iPres to have an actionable code of conduct in place each year before registration opens.*
See Examples: [Code of Conduct](#)

B. Scheduling and Milestones

Important Dates and Milestones

Each year, important dates and milestones for submissions, reviews, revisions, registration, and other are called out on the iPres Conference website and in announcements from the conference organizers.

In 2018, we included important dates in our Call for Contributions and on our website's registration page. It might have been helpful for us to have a dedicated website page for important dates to consolidate the milestones in one place (see limitations of website provider).
See Examples: Scheduling.

C. Organizing Team

The size, membership, and roles of the Organizing Team vary each year. Based on experiences in previous years, we tried in 2018 to specify roles and responsibilities for program pairs as a way to enable pairs to work independently and to maximize the team's time together. We also tried having a US (host country) co-chair is the primary representative for that pair and the international co-chair as the partner for the US person in that pair. Scheduling calls is challenging for international planning and we tried that approach for organizing the pairs. That approach worked in some ways, though availability changes and scheduling is always challenging.

It was important for the iPres 2018 Organizing Team for an applied domain like ours to emphasize the importance of all of the program content. Our team structure was informed by our experiences with iPres 2015 and 2016. For example, it has been common for iPres team members who are responsible for paper sessions to be called Program Co-Chairs, as we did, with the Organizing Chair(s) have overall responsibility for the conference program, coordinating across the team's pairs. *It might avoid possible confusion or demonstrate the importance of the whole of conference program to use the term Paper Co-chairs when that applies.*

See Examples: 2018 Organizing Team and Roles and Responsibilities.

D. Communications

Social Media

Social media has been part of iPres conferences since the start, though the channels have increased and 2018 may be the first year with a social media team as part of the Organizing Team. We used the official iPres 2018 twitter account primarily for formal announcements and personal accounts were used for more relaxed discussion and promotion.

By the end of the conference our iPres 2018 twitter account had over 400 followers. There was some contact via DMs, for example regarding conference registration issues. Official iPres accounts and dedicated hashtags should be monitored on a daily basis as the medium is one where conversations or issues can quickly expand beyond the original topic with posters

tweeting views they may not be so quick to share in person!

Tweets included the official conference hashtag with other hashtags included as appropriate - to reach out to other communities or conferences, for example. We repeated tweets to a reasonable degree to reach audiences in different timezones or to share reminders. *Regular tweeting during the conference sustains engages the community leading up to the conference and during the wrap up*.

We closed our official Twitter account soon after the conference, which meant it was not available during the conference wrap up. *We encourage organizers to coordinate communication plans with future the next year's organizers and to close the account when the wrap up is completed.*

We published four iPres 2018 blogposts to promote specific aspects of the conference, using different platforms each time. *We encourage other organizers to share as many as possible to extend the reach of the iPres community.*

Collaborative Notes

iPres 2018 expanded the use of Collaborative Notes using Google Docs. These were extremely well received by attendees both in person and remote, though there were occasional issues with access/edit settings, and the notes pages were uploaded to our iPres 2018 Proceedings in OSF as part of comprehensive conference documentation for all sessions. This was part of our effort to provide as much information as possible to people who were not able to attend.

We encourage organizers to continue and refine efforts to share with the conference experience with the in-person and virtual members of the community.

Conference Website

We followed precedents set by previous iPres organizers in developing our iPres 2018 conference website. Our website service provider proved challenging with very limited features that dictated some of our options for posting content and updates. We thought about changing providers, but determined that would be confusing midstream and so struggled on successfully with the aid of a very able website coordinator.

We had already decided to create a complete record of the conference proceedings using the Open Science Framework (OSF) and with the limitations of the website, we relied more heavily on OSF than expected when we could not provide the detailed schedule and other components effectively or at all through our website. Having information in multiple locations proved confusing to some, though we tried to share clear and timely updates.

It is worth ensuring early in your planning that your website can do what you need it to do.

Communicating Options

We communicated with submitters using EasyChair, as previous organizers have. We communicated with attendees using our Registration System. We experienced some challenges with these options, such as responses from submitters not getting to the Organizing Team until we identified and fixed that problem and all attendees receiving messages because someone had registered for them. We established an Organizing Team email address that was somewhat helpful in addressing these issues. *An easier and more effective means for communicating*

would be helpful, and some organizers may have found options that worked well.

The iPres Working Group that convened as a result of iPres 2018 discussions is establishing an iPres Interest Group list as part of its work, which might be helpful to future organizers in communicating with attendees the community.

2. Program Components

The conference program for iPres 2018 included a keynote, paper sessions, discussion panels, workshops and tutorials, posters and demonstrations, and Ad Hoc sessions (lightning talks, ad hoc tutorials, original digital preservation graphics, and two digital preservation gamerooms). The terms for ipres session types have been used in different ways, so we provided definitions in our submission instructions to avoid ambiguity. In response to a lot of feedback from regular attendees, we dropped the requirement to use the ACM template for submissions, making it an option for papers only. We found that the elements we identified in our submission instructions fit the submissions types and apart from recommending the use of a template with common ipres elements and specific elements for different submission types, shifting away from the ACM template worked well.

A.   Paper Sessions and Papers

iPres 2018 offered an optional abstract review phase for papers in an effort to expand the pool of proposals.
The call for proposals resulted in 64 paper submissions, from which we accepted 42 for the conference (17 long and 25 short).
- We rejected several submissions and recommended these submissions as posters or lightning talks, ultimately resulting in 3 submissions accepted as posters and 3 submissions as lightning talks.
- The authors of accepted papers were from 18 countries (of the 22 represented in the 64 paper submissions)

The paper awards this year allowed for two winners and two runners up from both short and long categories, a change from years prior with the addition of runners up and the categories best long and short paper.

B.   Discussion Panels

IPres 2018 added the role of Discussion Panels Coordinator. Panels in previous years have sometimes been paired with papers or posters. We developed moderator guidelines, organized a webinar with moderators and session chairs to ensure that they were prepared for their roles, and reviewed the Code of Conduct because the nature of open discussions can sometimes require extra attention. Our program included ten discussion panels.

C.   Workshops and Tutorials

Though iPres 2018 provided more workshops than many ipres conferences, we were able to accept less than half of the workshop submissions. We also emphasized recent developments,

which prompted some pushback from some submitters.

On the workshop day of the conference, all organizing team members helped out to check attendance at each workshop/tutorial, to support the presenters with technical issues, to monitor conduct at each, and to help relay logistical needs to the co-chairs throughout the day.

Workshops present a special case for space concerns. On the one hand, the workshops were very popular and most were oversubscribed; on the other hand, the rooms were right-sized for interactive workshops (i.e., 25-40) so more space would not be good for workshops.

One challenge that affected workshops was our registration system. The departure of the person one our event planners team who had set up the registration system meant that it was very difficult to get a current registrations for workshops. Another complication was that when an administrative person registered one or more attendees, sometimes that meant that those attendees did not receive our messages with updates about registration. This added to the challenge of overscribed workshops because a number of attendees were unaware that workshop registration was open. Not being able to easily get attendee lists for workshops prevented timely updates to our website to indicate overscribed sessions, which might have helped.

Possibilities for future organizers to consider in organizing workshops include: ensuring that attendees are receiving messages; more actively managing attendee expectations by sharing updates through communication challenges; identifying especially popular workshops to repeat during the conference if possible; and expanding the ways in which people who cannot attend workshops can get access to the workshop content.

D.   Posters and Demonstrations

We organized the first digital poster session at iPres 2018 with 23 posters and two demonstrations. We worked with the digital display provider to offer a webinar for poster presenters and shared poster instructions to help presenters take advantage of the features offered by digital posters. We uploaded the minute madness slides and the poster and demonstration files to the proceedings. We hoped that a 90-minute poster session would allow time for all attendees to cycle through the posters,though the available space was reduced to adhere to fire regulations, something we learned fairly close to the conference. The feedback from attendees was very positive.

E.   Ad Hoc Programming

There have been some lightning talks at one or two previous iPres conferences, but 2018 was the first conference with a dedicated track for ad hoc programming with new categories of submissions: digital preservation games, digital preservation original graphics, ad hoc tutorials (a way to include tutorials that were submitted but not accepted for the Workshops and Tutorials day) plus a full slate of lightning talks.

Ad hoc programming was an experiment for 2018 made possible by the availability of space intended for small informal groups to see if attendees were interest and if the sessions filled a gap - both proved to be true. By allowing submissions of recent developments up to the month before the conference, we were able to include new developments and topics, and include as many presenters as possible, some of whom were able to attend because of their participation.

As an open space (partial walls and open to an active hallway on that floor), support for audio and video were limited. In the original conference schedule, there would have been regular sessions opposite each ad hoc session, but a late change at the venue meant that only group meetings were opposite one ad hoc session that included lightning talks to introduce the DP games, the original graphics, and a set of lightning talks. The session was jammed with people, which was wonderful and not ideal for the space.

Managing expectations for ad hoc programming is necessary - what to expect and what to prepare for. It might be worth trying separating the categories into different spaces - lightning talks in a space for regular sessions with full AV support and the gameroom in an informal space possibly for drop in during the conference. One suggestion was to set up game tables at the reception(s) for people who would prefer that kind of socializing.

F. Après iPres

Simmons College, near the iPres 2018 conference venue, hosted this informal post-conference event. There were about 50 attendees, 47 people had signed up for the event and there were five organizers.

Attendees proposed ideas for breakout sessions then down pitched their idea to the group. The final slate included four topics: 1. Preservation Action Registries 2. Labo(u)r in digital preservation 3. Hardware 4. Workflows. Following the group discussions, there was a round robin of lessons learned from the conference or if they chose, a controversial remark about digital preservation. There are [attendee notes](#) for two of the breakout sessions plus a DPC [blog post](#) by Paul Wheatley's with his perspective on format validation from the session.

The iPres 2018 organizers convened the Après iPres organizers with the objective of providing an opportunity for iPres attendees to continue the discussion and for members of the local digital community who could not attend to participate.

We intended for this to be a separate event that supplemented the formal iPres conference, including having a separate website and communication paths though the host. We provided the Après iPres organizers with access to the conference presenters and an open-ended charge to create a program of their choice. To avoid potential confusion and maximize the impact of an event like this, future iPres organizers will need to consider how best to communicate with attendees and how to connect the program with the formal conference. The attendees who participated really enjoyed Après iPres.

3. Program Development and Documentation

A. Call for Contributions

The theme for iPres 2018 was established early in our process - "Where Art and Science Meet: the art in science and the science in art," and we embraced the celebration of the 15th anniversary of iPres. The conference theme informed the development of the Call for Contributions and the conference program.

To extend the reach of the call, we disseminated [Call for Contributions](#) into 3 other languages in addition to English: Spanish, French & German. The Organizing Team incorporated as many non-English speaking dissemination channels as possible and shared its communications list to the 2019 organization committee to build upon, as previous years have done. We hope that future organizers will continue efforts like these.

B. Submissions Process

Our submission dates were similar to previous years. Our addition of an optional abstract review for papers was confusing to some and appreciated by many submitters. We provided [submission instructions](#) for each type of submission. The feedback from submitters was positive.

The iPres 2016 organizers provided detailed documentation of their use of EasyChair to manage the submission, review, and acceptance process. We did not have access to the 2016 operating guide until late in our process for a variety of reasons. *Organizing Teams need to prepare for managing this process and might consider alternatives if those would work best for them.*

C. Review Process

We used a peer review process for papers, panels, workshops and tutorials, and posters and demonstrations that was aligned with previous iPres years. We had three reviewers for all submissions (except Ad Hoc Programming), more than some previous organizers. We describe our paper peer review process more specifically below.

Paper review process:
- A minimum of three reviewers reviewed all papers. In case of doubt, a fourth reviewer from the Organizing Team invited a fourth reviewer to assess the paper's quality.
- Only two peer reviewers out of 58 did not complete their reviews. The Organizing Team took on extra responsibility to assess those two peer reviewers' assigned papers as well as reassessments of papers which required further review.
- Ultimately, we restated reviewer commentary in providing feedback to authors due to the tone of some reviewers that was not constructive or collegial. We provided full verbatim commentary to accepted authors and rejected authors who requested it.
- Organizing team members re-reviewed revised papers from authors of accepted papers that they re-submitted to reflect reviewer commentary then followed up with authors when reviewer comments had not been satisfactorily addressed.

[Reviewers](#)

The Program Co-Chairs in their oversight role for papers coordinated iPres 2018 reviewer selection on behalf of the Organizing Team. With feedback from all Team members, they selected **as diverse a group of peer reviewers as possible** while being inclusive of past reviewers. The group of reviewers represented **16 countries**.

Increasing the diversity of reviewers meant not including some who were used to being on the list and we received some significant pushback about that. We also found in hindsight that one organization was overrepresented in 2018 and it was too late to adjust that. *We recommend reviewing the final list for over- or underrepresentation of any kind.*

We asked reviewers who agreed to review submissions for iPres 2018 to indicate their availability, willingness, and ability to review different types of submissions and to contribute to developing the program in other ways during the process. This information informed reviewer assignments in lieu of allowing reviewers to bid on submissions to review. we received some pushback on not having bidding. We did not involve reviewers as much as we might have after the submission approval process ended, e.g., in reviewing revised papers or helping to gather conference content. *We encourage organizers to continue to find ways to engage more members of the community in the conference.*

D. Conference Agenda and Program schedule

We shared the [high-level schedule](#) on our conference website, and the [detailed schedule](#) and [full proceedings](#) in OSF. This was a different approach than previous years and we did field some questions and frustrations, though overwhelmingly the response we had about the conference program and the use of OSF. We did not do the math, but based on our experience with the number of tracks and sessions in previous years, iPres 2018 very likely had more conference content than other iPres conferences including paper, workshops, and panels as well as the new ad hoc programming. Providing more content had great benefits and of course, some challenges. *We encourage organizers to continue to experiment with new and increased conference offerings.*

Space was something we needed to balance in developing the conference agenda. For most time slots, we had a session scheduled in the large auditorium and we tried to provide a compelling option there so attendees would always have a session to be in even if it was not their first choice. We decided to separate the one room could be separated to provide the most options and content for attendees, a decision that meant not everyone could be in every sessions they wanted to be in - a challenge that every conference faces. It is not possible for organizers to know which sessions will be most popular. We would not change our decisions about the program sessions to allow as many topics and presenters as possible to be included. *One takeaway is to work through options for even more actively managing expectations and for sharing decisions and options through available communications channels.*

E. [Awards](#)

iPres 2018 included an awards ceremony during which we announced paper and poster award winners. We shared our award procedures for [Papers](#) and [Posters](#). We hoped to include some informal awards for ad hoc programming. *We hope that future organizers will consider ways to expand opportunities for recognition of achievement and other contributions.*

The paper awards for 2018 allowed for two winners and two runners up from both short and long categories, a change from years prior.

The two poster awards named the Best Poster as determined by a review committee and the Popular Poster based on attendee voting. The display provider for the digital poster session supported voting with results available at the end of session.

We found that it was unexpectedly tricky for papers and we needed to identify an alternative for the payment when the winning short paper had eight authors. *It is worth determining how award payments will be made.*

We hoped to identify the complete set of iPres awards to date. and found that it was not easy to identify previous iPres award winners. We highlighted the winners on our website and in the proceedings. *We encourage organizers to highlight awards in final proceedings and iPres to consider how to share a cumulative list of award winners.*

F. Proceedings

iPres 2018 marks the first time that comprehensive proceedings containing all of the content shared by presenters for all sessions (with the exception of one embargoed paper) are open available. We figured out how to represent the proceedings using the Open Science Framework (OSF) as we went along. ipres 2019 will be using OSF and we have made available all of our documentation and scripts for future use.

OSF provides DOI support. We included the OSF DOI in uploading iPres 2018 papers to the central iPres repository that is hosted in Vienna, so there is a link back to the full entry in the iPres 2018 proceedings. There may be an easier method than we found, but using the instructions provided, the upload process to the iPres repository was slow, but doable. The managers of the iPres repository provide the login information and instructions for uploading to the iPres organizers each year. We uploaded the final revised versions of the papers from authors, the version that is available in the OSF proceedings, after the conference. We recommend allowing time for uploading to the repository.

We encourage organizers to continue to share comprehensive, citable, and open proceedings and to support post-conference revisions, uploading, and updates to reflect the full record of each conference. We recommended to the iPres 2019 that iPres conference content be included as a testbed for their hackathon planning.

4. Event Planning

Event planning for iPres conference might vary more than any other conference organizing area depending on the number and type of hosting institutions, the location (large city, university campus, smaller city). We highlight things that works well and things we might have done differently. We worked hard and were very pleased with iPres 2018.

A. Budget and administration

The way in which budgets are constructed and the conference planning administered varies from year to year. There are no central ipres funds or funding that carries over from the previous years to help with conference budget, which means that the budget consists of revenue (registration fees and sponsorship) minus expenses.

iPres 2018 is the first co-sponsored iPres with MIT Libraries and Harvard Library Hosting. Harvard served as the financial base for our conference because iPres 2018 took place at a Harvard Conference Center and all the payments were easier going through Harvard. The Harvard Organizing Co-Chair changed just prior to convening our Organizing Team. That transition added to our startup complexities and MIT took on a larger in organizing role, which in part balanced Harvard's financial role.

We used an event planner, AE Events, which was a good choice for us, though all host

institutions would not prefer or be able to choose that option. That cost and the cost of the venue had the largest impact on our conference budget and informed our decisions about registration rates.

Our approach to organizing iPres 2018 worked for us and we are really pleased with the outcomes. We achieved the things, new and familiar elements, that we identified. *We encourage embracing an approach that works though it may differ from previous years.*

B. Sponsors

There are some sponsors that have been repeat iPres sponsors. We reached out to that list of known sponsors and a few others, and invited them to work with us to achieve the outcomes we had for iPres 2018.

Some sponsors submitted proposals for presentations in response to the Call for Contributions or the Ad Hoc Programming Call with the expectation that these would not be product demonstrations, but provide substantive content to the program.

We had one major sponsor, three contributing sponsors, two award sponsors, two community contributors, and four exhibitors (see our website [sponsorship](#) page). We asked them to comply with our decision to be as green as possible so to avoid printed materials, or confine them to their exhibit tables.

We offered a number of options for sponsors, hoping that we could identify support for specific costs such as travel cards and digital poster display boards, but only one sponsor worked with us on a sponsoring something that was important to them, Portico's tuition support for underrepresented students and first-time attendees.

We worked with open source providers and community sponsors on options to include them in the conference. *We encourage organizers to identify more ways to do that.*

C. Venue

We had three venues for iPres 2018: the primary location for the conference, Joseph B. Martin Conference Center at Harvard Medical School, plus one reception at MIT and one at Harvard. See our [venues](#) page on our website for details.

The conference feedback confirmed that the main venue worked well and provided many benefits to attendees. Most attendees appreciated the location, the amenities, and the staff at the venue.

Venue Spaces

Each conference venue has its own opportunities and challenges. Attendees had access to the whole of the venue, which provided flexibility for impromptu meetings and spontaneous discussions. We did have some space challenges with the venues. The rooms we had for sessions were on three floors and navigating between rooms could be confusing, though attendees settled in fairly quickly and the event planners staffed an information desk next to registration, a service that was widely praised by attendees.

We had one large auditorium that could hold more than the total number of attendees. We also had several smaller rooms that one of which could be divided into two parts and one of which had fixed auditorium-style seating. We also had access to an open space, which inspired

the Ad Hoc Programming that was very popular with attendees.

D. Registration

There are several factors in determining when to open registration and how long early registration should last. A number of attendees require a conference schedule to get their travel approved by their organization. This requirement can be challenging for a Fall conference to push through the session approval process before the summer holidays when many presenters and others might be unavailable. We opened registration, provided a list of accepted papers (our first content release using OSF for our proceedings) as previous iPres organizers had done, extended early registration for two week longer than our host sponsors preferred then kept registration open until September 15.

We found the closing date for registration to be too close to the start of the conference to comfortably process the registrations, create attendee lists, prepare badges, and complete other steps that required a final registration list. We identified specific registration challenges under Workshops and Tutorials.

The registration system for each iPres conference is one that is available to the organizers. We used Certain, a registration system for which Harvard has a site license. It worked okay and required technical support that was not easy or possible to get.

If there is a full-conference planning system that supports submissions to post-conference, that does not require exporting and manipulating information, and that is available and affordable, that would be ideal.

Accommodation options

We worked with our event planners to identify the best rates we could get for accommodations that were in the vicinity of the venue and tried to share helpful information to attendees through our website and our registration system. Some iPres conferences have offered hotel registration directly through their registration, an option we were not able to offer. For the most part, the feedback we had was positive, though some attendees would have preferred other or additional options.

E. Social events

We provided two receptions, one at each co-hosting institution, and an awards ceremony, as well as information about what to do in Boston and the local area. We provided travel cards for people to get to the venues and scheduled a bus in case some people required or preferred that option. The logistics became complicated when the travel cards were delivered very close to the end of the first day of the conference and more people opted for the bus than anticipated. We based our decisions on previous iPres conferences that sometimes provided travel cards and/or instructions for getting to receptions and other social events and that provided buses only to find that attendees did not use them. The feedback was almost entirely positive about the receptions and there were some frustrated responses about the buses. We realized late in our planning that we were already at a Harvard venue so might have held the Harvard-sponsored reception at the main venue. We share these notes to assist future organizers.

F. Wrap up

Conference feedback

We used the 2016 conference feedback questions to enable some form of a longitudinal perspective. We received more than 150 responses, a good response rate for 420 attendees, and the feedback was resoundingly positive with an overall rating of 4.1 out of 5. A summary of the feedback is on our website and we shared a coded version of the anonymous open-ended responses with the iPres 2019 organizers and the iPres Steering Group.

See Examples: Conference Feedback Form

Follow-up and thank you's

There are a number of follow up steps to prepare for: processing last minute cancellations, ensuring that all session content is gathered, adding final information to the conference website (photos, proceedings, awards, a farewell message, and other), uploading revised papers and other conference content to share, finishing your iPres handbook installment, and thanking speakers, attendees and others.

We did not extend our planning to include roles and assignments for specific follow up steps and that might have been useful to think through. There is a rush leading up to and during the conference, then the team is dispersed. We might have benefited from a more systematic process for thanks you's and follow up steps, but we completed all of our work just after close of our calendar year.

Handshake with next year

We have been in early and ongoing contact with iPres 2019. We have shared our planning documentation, lessons learned, and anything that might be helpful. One thing to work out is the overlap in communications. The wrap up period after each conference includes important steps like finalizing the proceedings and the conference website and providing updates to attendees and the broader community. Coordinating that overlap before the conference might be helpful. Future iPres conference organizers might also be interested in establishing a presence during your conference so allowing time and space for those possibilities would be helpful

iPres 2018 Handbook Examples

1. A. Conference Culture

iPres 2018 Code of Conduct and Response Framework

iPRES 2018 seeks to provide an inclusive, collaborative, caring, and respectful community environment for everyone, regardless of gender, gender identity/expression, race/ethnicity, sexual orientation, disability, physical appearance, age, language spoken, national origin, and/or religion. We are committed to diversity and free expression of ideas, and creating a conference in which participants feel welcome to learn and exchange ideas in an environment of mutual respect. We also are dedicated to providing a conference experience that offers extraordinary and joyful learning experiences for everyone.

We do not tolerate harassment or disrespect of iPRES 2018 participants in any form. Sexual or discriminatory language and imagery are not appropriate for any event venue or online platforms associated with iPRES 2018, including presentations, discussions, and associated social events.

If someone makes you or anyone else feel unsafe, harassed, or unwelcome, please report it as soon as possible. Conference organizers will initiate action to address the issue. Participants who are asked by anyone to stop any harassing or disrespectful behavior are expected to comply immediately.

All participants are required to adhere to the Code of Conduct and respect fellow participants in order to ensure a safe, welcoming, and inclusive learning experience for everyone present. We have established a specific and accessible response framework to be applied in the event of an incident.

Long Version

iPRES 2018 seeks to provide an inclusive, collaborative, caring, and respectful community environment. We are committed to diversity and free expression of ideas, and creating a conference in which participants feel welcome to learn and exchange ideas in an environment of mutual respect, regardless of individual's personal, professional or social backgrounds. We also are dedicated to providing a conference experience that offers extraordinary and joyful learning experiences for everyone.

Feedback on your experience at iPRES 2018 is welcomed as an opportunity for continuous learning and towards meeting our goals of inclusion and equity.

Behaviors Not Tolerated
We do not tolerate harassment or disrespect of iPRES 2018 participants in any form. Sexual or discriminatory language and imagery are not appropriate for any event venue or online platforms associated with iPRES 2018, including presentations, discussions, and associated social events.

Harassment is understood as behavior that intimidates or threatens another person or group of persons. It includes a wide range of behaviors, including offensive verbal comments and slights related to gender, sexual orientation, disability, physical appearance, body size, ethnicity, nationality, race, or religion; sexual and or discriminatory images in public spaces; stalking; following; inappropriate photography or recording; sustained disruption of talks or other events; inappropriate physical contact; and unwelcome sexual attention.

Response Framework

What You Can Do & How We Will Respond

If someone makes you or anyone else feel unsafe or unwelcome, please report it as soon as possible. Harassment and other code of conduct violations reduce the value of iPRES 2018 for everyone.

If a participant engages in harassing behavior, the organizers will initiate action in response. Participants who are asked by anyone to stop any harassing or disrespectful behavior are expected to comply immediately. Sanctions may include, but are not limited to, warning the offender, withdrawing the offender's position on the programme, requiring the offender to leave the session in which the harassment takes place, immediate expulsion from the event, and reporting the offender to local law enforcement.

If you are being harassed, notice that someone else is being harassed, or have any other concerns during the conference, please notify the Organizing Team or event staff as soon as possible.

Please note that all reports are kept confidential and only shared with those who "need to know". Retaliation in any form against anyone reporting an incident of harassment, independent of the outcome, will not be tolerated.
What the iPRES 2018 Organizing Team commits to
Organizing Team Members will wear easily identifiable name badges to facilitate identification and will be available throughout the conference and at the main Registration Desk.

Where immediate action is required we request the issues are raised in person. If safety is a concern, we will identify an anonymous reporting means that we will identify and share prior to the start of the conference. Issues may also be raised by email to ipres2018contributions@gmail.com or by messages to the @ipres2018 Twitter account and we will respond to those as soon as we can.

We will be happy to help you contact hotel/venue security, local law enforcement, local support services, provide escorts, or otherwise assist you to feel safe for the duration of the event. We value your attendance.

We intend to have a member of our team attend every session to assist in responding and documenting if an incident occurs or an issue arises.

Harassment in-session:

Session chairs and Organizing Team representatives are expected to monitor the session. Should harassing behavior manifest or be otherwise reported, session chairs and Organizing Team members will immediately request the offender to cease. If an incident occurs, the organizers will work to understand and document what happened to determine an initial response. All incidents will be handled on a case-by-case basis, using a thoughtful approach while keeping the iPRES Steering Group (STG) apprised.

Decisions to expel participants from a session or from the conference will be discussed with one of the Organizing Co-chairs in consultation with sponsors and iPRES Steering Group before acting.

Incident details will be logged in confidential Organizing Team records.

Harassment out-of-session:

Should harassing behavior manifest elsewhere associated with the conference and be reported, Organizing Team members will respond. Issues requiring immediate action must be acknowledged straightaway by at least one Organizing Team member and subsequent actions or investigations initiated. Responding and reporting will be handled by the Organizing Team on case-by-case basis in a manner that fits the nature of the offense, while also keeping the iPRES Steering Group informed. Issues requiring discussion with the complainant before agreeing to a response should be dealt with sensitively in a private space and the complainant made aware of how the Organizing Team wishes to respond.

For serious incidents:
- Decisions to expel participants from the conference must be discussed with both of the Organizing Co-Chairs before being actioned.
- Accusations of criminal activity must be reported to local law enforcement and Conference Chairs notified immediately.
- Complainants must be supported for the remainder of the event as appropriate.

Incident details must be logged in confidential Organizing Team records.

Important contact information:

Prior to the start of the conference, contact information (phone numbers and/or email addresses) for these and possibly other primary contacts will be made available to attendees (in-person and virtual):
1. Conference hotels
2. Conference and reception venues
3. Numbers of all Organizing Team members
4. Local police department
5. Local sexual assault / crisis line
6. Local taxi and ride companies.

A report will be filed with the iPRES Steering Group (STG) at the end of the conference en summarizing any Code of Conduct violations or issues. Every attempt will be made to anonymize incidents unless they are of a criminal nature or resulted in participants being banned from the event.

Message from the iPRESs 2018 Organizing Team:

Thank you to everyone who contacted us about having a Code of Conduct for iPRES 2018. We have been finalizing both the Code, but as or more importantly our incident response protocols - here they are. There was never any doubt that we will have a Code of Conduct for iPRES 2018 – this is a high priority for all of our team's members as well as a requirement of the co-hosting institutions.

If you would like to share any feedback with us, please contact us at: ipres2018contributions@gmail.com.

Sincerely,
iPRES 2018 Organizing Team
Resources
The iPRES 2018 Code of Conduct and Response Framework was informed by these community resources and exemplars:

- [Codes of Conduct inside Digital Preservation](#)
- [IS&T Archiving Code of Conduct](#)
- [MIT Libraries Code of Conduct](#)
- [RDA Draft Code of Conduct](#)
- [Geek Feminism Wiki: Conference anti-harassment/Policy](#)
- [How to Write a Great Code of Conduct](#)

1.B. Scheduling and Milestones

iPres 2018 Conference Dates

Optional Abstracts: We encourage authors to submit papers abstracts to receive feedback on your proposal prior to submitting your paper. The iPres 2018 Organizing Team will provide feedback to submitters for abstracts received between **15 February and 20 March**.

Papers: Long papers for peer review are due by **15 April**.
   ● Revised papers with revisions that address reviewer comments are due **15 June**.

All other peer-reviewed contributions: proposals for posters and demonstrations, workshops and tutorials, and panels are due **15 April.**

Notifications: All submitters of peer-reviewed contributions (papers, panels, posters, demonstrations, workshops, and tutorials) will be notified by **23 May.**

Ad Hoc Programming: digital preservation games, original graphics, and lightning talks will not be submitted through EasyChair. These contributions will have a rolling deadline and acceptance cycle: 11 **June - 31 August**.

Post-conference revisions: Authors are encouraged to update their papers based on discussions during the conference. **Final revisions after the conference** will be due by October 31.

Registration
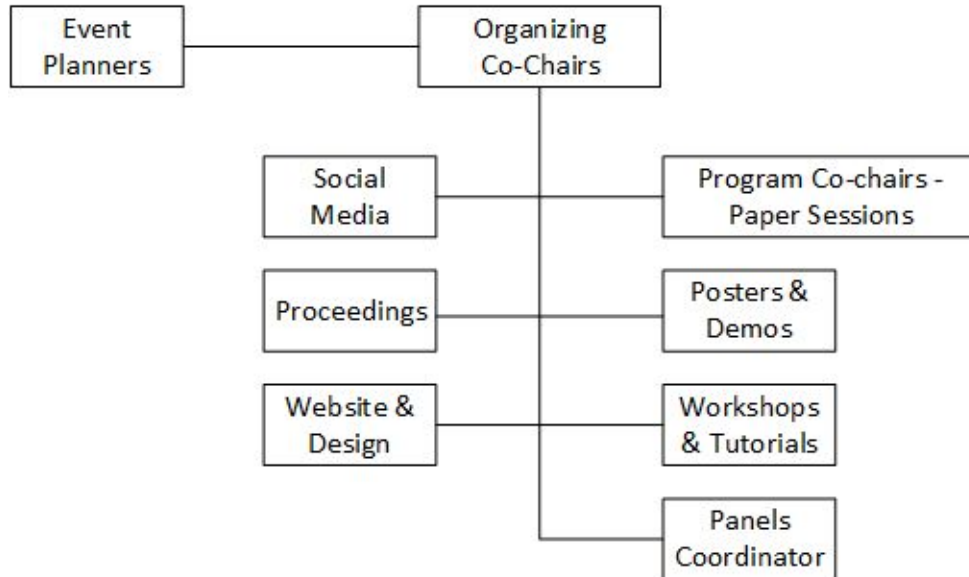**Earlybird registration** dates: 8 May - 16 July 2018
Regular registration dates: 17 July - 15 Sept 2018
On-site Registration required after 15 Sept 2018

1.C. Organizing Team Structure and Roles

2018 Organizing Team

iPres 2018 Organizing Team

iPres 2018 Organizing Team Structure

- Organizing Co-chairs(2)
- Program Co-chairs for paper sessions (2)
- Discussion Panel Coordinator (1)
- Workshop and Tutorial Co-chairs (2)
- Poster and Demonstration Co-chairs (2)
- Proceedings Developer (1)
- Social Media Team (2)
- Ad Hoc Coordinators (2 from existing members: Organizing Co-chair and Social Media)
- Website and Design Coordinator (1)

iPres 2018 Organizing Team: Roles and Assignments

Organizing Co-Chairs
Nance McGovern + and Ann Whiteside +
- Co-Facilitators of the Organizing Committee
- Liaisons to Co-Host Sponsors and Host Institution staff
- Responsible for:
    - Conference budget, registration, sponsors, event planner coordination, keynotes
    - Overall conference program

Program Co-Chairs
Courtney Mumma + and Erwin Verbruggen
- Coordinate review of all paper submissions and recommend finalists based on results
- Confirm and coordinate with submitters, participants, identify chairs/commentators as needed
- Recommend sequence and room assignments
- Facilitate and recommend the selection of the best paper award, and that portion of the award ceremony

Workshops and Tutorials
Bertram Lyons + and Natalie Pang Lee San
- Coordinate review of submitted workshops and tutorials, recommend finalists based on results
- Identify possible additional workshops and tutorials space permitting
- Confirm and coordinate with submitters, instructors, and participants
- Determine room assignments and coordinate with Event Planners during conference

Posters and Demos
Sibyl Schaefer + and Jaye Weatherburn
- Coordinate review of submitted posters and demos and recommend finalists based on results
- Identify possible additional posters and demos (share CFP and consider topical gaps to fill)
- Consider ways to incorporate demos into the conference
- Tackle trying out digital posters with input from event planners
- Coordinate the poster and demos session plus the selection and award for best poster

----

Panels Coordinator
Jessica Myerson
- Review panels submissions and suggestions for possible panels from organizing pairs
- Recommend panels for the program based on submitted, suggested, and possible panels
- Coordinate with panel participants, suggest chairs and commentators as needed

4.F. Wrap up

2018 Conference Feedback Survey Questions

1. How successful was the conference for you? Comments.

2. Rate the Program (rating: 5 = high and 1 = low)

    a. Keynotes

    b. Papers

    c. Panels

    d. Posters and Demonstrations

    e. Workshops

    f. Tutorials

    g. Ad Hoc sessions

    h. Other (please specify)

3. Please rate the timing for the following program components:

    a. Keynotes

    b. Long papers

    c. Short Papers

    d. Panels

    e. Workshops/Tutorials

    f. Time for Networking

    g. Time for Meals/Coffee Breaks

    h. Duration of the Conference

    i. Time for Ad Hoc Sessions

    j. Other (please specify)

4. Overall Assessment

    a. General Atmosphere at the Conference

    b. Conference Organization

    c. Conference Documentation

    d. Conference Location

    e. Accessibility

    f. Food Quality

    g. Social Program

    h. Other (please specify)

5. Overall Assessment - comments

6. Please rate the Organization of the conference

    a. Conference Website

    b. Online Registration

    c. Info desk on-site

    d. OSF Proceedings

    e. Receptions

7. Organization Comments

8. For 2019, would you recommend?

    a. Same number of programs

    b. Same number of workshops

    c. Repeat Ad Hoc

    d. Digital posters

    e. Other (please specify)

9. Other feedback you would like to share?