

HOW TO RUN A WORKSHOP

The most critical aspect in creating a stimulating workshop is that it is designed around a compelling science topic with wide interest.

Philippe's senior colleague stops him in the hall and says: "Hey Philippe, wouldn't it be great to get everyone together for a workshop on the most exciting advances in geochemistry and mineralogy?" All of a sudden, Philippe is in charge of a three-day workshop with international participants. Back in his office, Philippe realizes that (1) he needs to find out how to run a workshop, and (2) he should never agree to anything while standing in the hall.

Whether Philippe really has a large job ahead of him depends completely on his decisions regarding the scope of the workshop. Workshops that are relatively easy to organize contain a large number of familiar or informal variables, like those given in TABLE 1. In contrast, workshops that take longer to organize have many, more complex variables (TABLE 1). However, these more complex approaches may provide a richer experience for the workshop attendees and organizers.

Science Goals for Workshops

Before running his workshop, it is important for Philippe to decide what he wants to achieve in terms of the scientific goals and what kind of participants he hopes to involve. The most critical aspect in creating a stimulating workshop is that it is designed around a compelling science topic with wide interest. Philippe decides to focus on one exciting new advance in mineralogy and geochemistry and then sends tentative invitations to speakers. He defines the delivery format (e.g. lectures, discussions, labs, field trip, etc.) and decides on the level of science output—he considers informal discussions, media (videos, web pages, databases), and a peer-reviewed volume or journal issue with papers or abstracts.

Peer-reviewed volumes have a lasting impact on science and provide a wonderful service to the community, but this avenue would add another dimension to Philippe's job. He chooses to team up with some other scientists and produce a volume. He needs to find authors who are willing to write on appropriate topics in the required timeframe. Then he defines the manuscript and figure format, finds reviewers, obtains funding for printing and shipping the volume, keeps track of authors' and reviewers' responses, and obtains copyright. Philippe is told that preparing a peer-reviewed volume might take 24 months from the initial stages

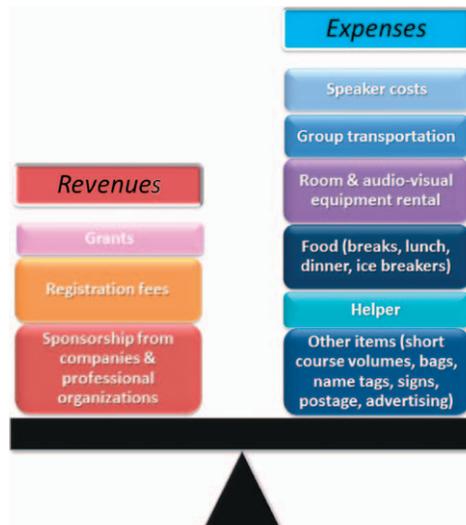


FIGURE 1 Revenues versus expenses for a workshop. For most workshops, the goal is to balance revenues and expenses.

to publication, so he plans to be engaged in the project for 30 months because he knows that there are always unforeseen hurdles.

Preworkshop Logistics

The budget is one of the most difficult parts of the preworkshop logistics. As shown in FIGURE 1, most workshops aim to balance revenues and expenses. This means that it is critical to determine the largest revenue and expense items before proceeding with requests for sponsorship and going ahead with the workshop.

For many workshops in geochemistry and mineralogy, most of the revenue comes from the registration fees. From this perspective, estimating the number of speakers, professionals, and students who will attend is essential, because they generally pay different registration fees.

The largest expenses depend on the speaker costs and the workshop location. Many people think that workshop speakers have their costs entirely covered and might even be paid for their appearance. However, more often than not, invited speakers in academic workshops pay their own way or are only partially subsidized. Philippe decides to write a formal letter to each potential workshop speaker, and he places several upper limits on travel reimbursements, which are dependent on the likely registration numbers.

The venue chosen also contributes significantly to the workshop costs. The location defines the cost of travel for the invited speakers, as well as

the cost of the workshop room rental, audio-visual equipment, and food. It is helpful to consider site accessibility: if group transportation is required, the costs will be higher for the participants. Philippe tours a large hotel and the local university, looking at possible accommodation and facilities for his workshop, before deciding on a venue.

Once Philippe has confirmed the speakers and a location, he prepares a schedule with an agenda. All of the information that he has gathered up to this point is needed for the workshop-sponsorship proposal he will submit to a nonprofit professional organization. Getting such sponsorship may not mean that Philippe will receive a monetary contribution, but it may mean that he will have support from the organization when it comes to editing, formatting, producing, and distributing a scientific volume. At this stage it is critical that Philippe communicates with the sponsoring society because they likely include people who have run similar workshops before, and conversations with these "old hands" will help him figure out successful strategies and potential pitfalls in running his workshop. He may also request an example of a spreadsheet to use as a template for his budget.

Attracting Workshop Participants

As indicated in TABLE 1, a simple workshop may include a group of researchers who are familiar with each other and may already collaborate regularly. More complicated work-

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shops arise when people are brought together with no previous research collaborations and when they come from a range of countries for which visas are required. To attract his target participants, Philippe comes up with a snappy workshop title and writes a paragraph that conveys the workshop's aims. This information, along with the workshop dates and location, are used for an advertisement in *Elements* (of course!). The information is also distributed on a range of relevant listservs and entered in the calendars run by the Mineralogical Society of America, the American Geological Institute, and the American Geophysical Union. He also sends personal e-mail messages to his scientific colleagues. Finally, he puts the information, including registration forms, on the web and sets up a dedicated e-mail address for the workshop.

Phillipe remembers back to when he was a student and attended a workshop with a travel grant. He makes inquiries and finds out that

there are various options for funding available from his national science funding agency, so he submits an application for student travel grants. He also stops by the local cement company and gemstone distributors to alert them about the upcoming workshop, and they offer to sponsor a student travel grant, too. His plans are going well!

On-Site Logistics

Philippe does his homework before the workshop and decides to employ a helper to welcome participants at the registration desk. The helper will give each participant a welcome package, with a map to local restaurants and area attractions, the short course volume, a pad of paper and pen, and name tags. Importantly, this person will also help check that the audio-visual equipment works (with both Macs and PCs), that the presentation files are uploaded for all speakers, and that backup equipment is available.

Postworkshop

Philippe's workshop turned out to be a success because he planned carefully (just like you could, too!). After the workshop, he checked the budget and wrote a report, then sent his volume of papers out for review to further promote the workshop.

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TABLE 1 SOME VARIABLES THAT AFFECT HOW EASY OR DIFFICULT IT IS TO ARRANGE A WORKSHOP

VARIABLE or GOAL		INFORMAL	COMPLEX
Science	Scientific output	None or perhaps a summary of the discussions	A cutting-edge or timely volume with papers and/or abstracts, videos, web pages, databases, compilations, etc. May need to address details such as manuscript format, figure formatting, copyright, reviewers, and authors' responses to reviews
	Scientific activities during the workshop	Informal discussions	Lectures, labs, calculations, field trip, tests, activities producing scientific output
Participants	Organizers	One or a few	A large team
	Participants	Local or close collaborators and students	International researchers and students with no previous collaborations
	Overseas participants	None	Travel visas may be required
	Subsidized invited speakers	None or self-paying invited speakers	Several invited speakers who require travel, accommodation, and a per diem
Preworkshop logistics	Preworkshop agenda	None	Agenda, outline of workshop goals
	Workshop advertising	Conversation or e-mail	E-mail, listservs, web, fliers
	Workshop venue choice	Local to the organizer, quiet, and allows participants to mix	In a location that is difficult to access (e.g. field locality, site with high security, site with poor transportation, etc.)
	Requirements for the workshop room	Appropriate room (chairs, table, white board/paper), and A/V equipment	Appropriate room, A/V equipment, computers, Internet access, transportation, lab equipment, etc.
	Funding and budget	None or in-house funds	Funded by an organization that requires a proposal, budget, balance sheet, positive revenue, and report
	Registration	None	Registration required, with different fees for students, professionals, etc.
	Deposits	None	Required for workshop rooms, accommodation, food services, and/or publishing services
Logistics during the workshop	Helpers (or professional organizers)	Not required or done by people in house (e.g. students)	Required (although these services may be needed for complex workshops, they may simplify your job)
	Food requirements	Not required or minimal (e.g. coffee/tea breaks)	Three meals per day, coffee/tea breaks, icebreaker, response to dietary requirements
	Accommodation	None required	Accommodation in different price ranges, with different pricing for students versus researchers
Post-workshop	Budget	Not applicable	Balance the budget and provide documentation
	Reports	None	Write and distribute, then arrange for the workshop volume to be reviewed