



## Organizing an event: checklist with all necessary steps for the local organizers!

Please read these hints carefully, there are necessary requirements for a smooth and transparent organization of CA23149's events.

The MC decides on the budget of each Grand Period, workshops are usually treated equally with regard to length and number of participants.

### Preparation

- If you are an organizing team: Please **arrange who is responsible for what** (for smooth communication) and inform the GHM and Chair about it.
- Please write a **clear call for papers** to which every applicant should stick closely.
- Please describe your **target audience and the number of invited participants.**, e.g. *„we will invite up to xxx members of Ca23149“, „target group: young scholars from graduate student to early postdoc (up to 3 years after PhD with no stable full professorship position)“*, because the targeted audience is a main criterium for the selection of invited applications.
- Hence, **be as transparent as possible and communicate clearly**, e.g. also the number of applications (e.e. *89 applications, only 15 places*).
- Describe clearly what you want to get for proposal: e.g. *CV up to 100 words and abstract up to 500 words* (please stick to that because of equal chances)!
- Give a date until when the applicants will get an answer to the proposal, please indicate if persons are on a waiting list. Please **stick to that date** and inform all applicants about the status of application latest until this date.
- The **local organizers cannot change the agenda** of a meeting planned by the Action. It is only the Action management that can make such changes, if they have financial impact, the MC has to decide. The Action management will of course sometimes need to make changes to some events, but they will need to take into consideration the impact of such changes. If for example official invitations have already been sent out, changes to the meeting dates, venues, agenda etc, should be avoided. In this case the Action management should have a very strong rationale for doing so. Since changes are quite difficult, it would be better to not send out official invitations too

early. First, the Action should do a final check with the local organizer and confirm all details for the meeting. Then you can send out invitations. As long as invitations are sent out one month prior, it should be fine. Of course it is commendable to send out invitations earlier, if you are sure that the Action management and the local organizers will stick to the planning and for ensuring better management of the financial resources for the Action (recommendations of the CA's

→ We will only invite the participants officially when everything is fixed. Please send them an information about their acceptance and that the formal invitation will be sent out approx. 5-4 weeks before the event. Only then the participants can buy tickets.

### **Selection of applications**

- Please take under consideration that the COST Association has particular focal eyes on the **ITCs** (Inclusive Targeted Countries) **and YRIs** (Young Researchers and Innovators).
- Please be aware of the fact, that members coming from all countries should **be treated equally and without bias!** CA23149 has to stick on the general rules regarding the member countries.
- The event's organizers are responsible for organizing the programme, but one of the chairs will be consulting them during the selection process and should be informed about the applications and guidelines for selecting the applications.

### **Administration of event**

- Please acquaint yourself with the **main issues regarding the budget, number of participants** etc. as the MC has decided on (for the „Work and Budget Plan“).
- **Reimbursements** should only go to the persons **participating actively** (presentation, comment, not only to a panel chair/moderator).
- Please check carefully the **annotated rules** (e.g. refreshment supply; which should not be a meal).
- Please send the **programme** to the Grant Holder Manager for **distribution** as well as to the Social Media / Science communications coordinators.
- Please **sent the programme as well through mailing lists**, like H-Net for advertising reasons at least 2 weeks before the event.
- The Grant Holder sends an email to **participants regarding administrative issues** (mainly reimbursement) right after the invitation and as a reminder before the event. Please note that the next step of the reimbursement process can only start when everything is correct!

### **The event**

- Please read the paragraphs in the annotated rules closely regarding the attendants' lists (signatures required), the Local Organizer Support (LOS) and, if necessary, the OERSA (training school).

Please take into account: „*The LOS grant may not be used to cover expenses related to lunches and / or dinner. Only refreshments (light edible items and beverages not intended to substitute meals) may be covered from the LOS grant. The Local Organiser is invited to make suitable arrangements so that participants can pay for their meals during the event. The participants receive a Daily Allowance which is intended to also cover for meals expenses.*“ (Annotated Rules)

- The Grant Holder will provide you with giveaways and name tags via post, they send you right before the event the lists for signatures.
- If you organize a hybrid / online event, please use zoom, the log on data provided by zoom are necessary for reimbursement and, if necessary, for voting. Please check if you other programs if they can provide reliable log on data.

#### **After the event**

- Please sent the signed attendants lists (for each day) asap to the Grant Holder Manager (*as pdf and by post*), because they are **necessary for reimbursement**.
- Please write a **report on the event** for the Blog and website of CA23149 – it's important for reporting issues and visibility.
- As we urgently need publications, please discuss, whether you want to prepare a special issue / edited volume or publish the event's main outcomes elsewhere (blogs) – please inform the Grant Holder Manager, chair and the WG 4 leaders about that.