

INSTITUTE OF ADVANCED STUDIES

Guidance Document Organising an IAS Workshop



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Introduction

These guidelines are designed to assist workshop organisers and administrators by highlighting key tasks, issues to consider, suggested timeframes and sources of useful information.

The IAS team will provide general advice and support and will liaise closely with workshop organisers and administrators.

The IAS Co-ordinator is Mirela Dunic (mirela.dunic@surrey.ac.uk).

The IAS Administrator is Vicki Blamey (vicki.blamey@surrey.ac.uk).

1. The IAS Website

The IAS website can be found at www.ias.surrey.ac.uk.

The IAS website includes features to generate a micro-site specifically for your workshop. This will include pages for an event summary, participant registration, the Call for Papers (if relevant), and the Programme. **It is a condition of support from IAS that the workshop must be managed through this micro-site.** Assistance in generating the micro-site and help with using it is available from the IAS staff. It is a good idea to advertise your workshop on Departmental web pages and other websites and send information to email distribution lists, and these should include links to your IAS micro-site so that people can find out more about your workshop there.

2. Format of your Workshop

The Covid-19 pandemic has resulted in many events moving to online platforms. It is anticipated that most, if not all, workshops taking place during this academic year (2020-21) will take place online. Some may be able to run using a hybrid format, with local participants attending in limited numbers.

This guidance document contains sections containing information for organising fully on-campus and virtual events. Organisers of hybrid events will need to refer to both sections.

3. Key Organisational Tasks

Workshop organisers and administrators need to oversee the following tasks:

- Manage the event budget
- Book the venue and campus accommodation (The IAS team will assist if required) or select the online event platform
- Book hotel accommodation
- Promote the event
- Identify speakers and create the event programme
- Plan relevant catering and conference dinner/evening activities if applicable



- Ensure effective communication – internally as appropriate and externally with speakers, delegates & sponsors
- Submit a post event report and final budget to the IAS

The overall workshop plan (dates, structure, evening events, accommodation requirements etc) should be planned as far ahead as possible to enable effective administration and allow appropriate lead times.

4. Promoting your Event

Determining how to promote the workshop most effectively is the responsibility of the organiser, who will be aware of the key people to reach. Methods include direct mail, email, forums, relevant press, social media etc.

Social media can be used to share photographs and information at the event itself. The IAS team will provide events on twitter using the twitter handle is **@IAS_SurreyUni**.

5. Budget

Organisers will need to manage their workshop budget against actual revenues and expenditure throughout, so that it can be reviewed with the IAS on a regular basis.

Funding needs to be spent by no later than 31 July 2021.

A final budget is required once all costs and revenues are known (to be submitted to the IAS by no later than 2 months after the workshop).

A budget template will be provided by the IAS after grants have been confirmed and should be used throughout the event planning process to keep an accurate record of income and expenditure. Organisers will be given a project code by the IAS and all income and expenditure should be attributed to this code. An Agresso management report for the project code should be run periodically.

Processing of some, or all, of the following is likely to be required:

- purchase orders for external accommodation, conference dinner, taxis and programme brochure
- invoices for event sponsorship
- visitor travel expenses
- delegate payments (Surrey Online Store run by Finance)
- any other financial transactions associated with the workshop

Where possible, we encourage sponsorship from external sources to be for a minimum of £200. This is due to the administrative resource required to facilitate payment of sponsorship and allocation to the correct project code, particularly if the sponsor is not a current University supplier. For small sponsorship amounts, where sponsors are not existing University suppliers, it may be possible to issue a pro-forma invoice and payment instructions instead. The IAS team can provide further information if required.



The IAS funding does not need to be matched for the academic year 2021-21. Organisers are welcome to seek additional sponsorship for their event but this is not required.

6. Event programme

For each Workshop an event brochure, including programme, abstracts and event details is required. This is published on the IAS Workshop website and will also be given to workshop attendees, either in printed hard copy or electronically.

The IAS team will oversee the production of the brochure, liaising with the workshop organiser and University design and print staff during the production process.

7. Registration

If the event is chargeable (or part chargeable) the event should be listed via the Surrey Online Store. This is run by the Finance team and allows ticket sales to be attributed directly to your project code. To get your workshop details uploaded to the online store you will need to fill out the [Online Store Request Form](#). You can also sell University Accommodation via the online store.

Please note that it may take several weeks for your event to be listed so allow plenty of time.

It is very important that you complete the Form accurately as making changes to the listing retrospectively will be complicated and time-consuming.

If you are including meals for guests at venues outside campus VAT will apply and a separate project code will be needed for the allocation of these costs. In this instance, please liaise with the IAS administration team.

If your event is totally free delegate registrations can be managed directly on your IAS micro-site. The IAS team will assist with this.

8. Administrative Support

Workshop organisers are likely to require 5-7 days of local administrative support to assist with the organisation of the workshop. This would ideally be someone already working in an administrative role who is familiar with University processes and has access to the relevant IT systems (such as Agresso). Only administrators in part-time roles can take on extra paid hours. Once the administrator has been identified, the IAS team will arrange a meeting to go through the process and will provide ongoing advice and support as required. The event administrator should be available during the event itself to assist with registration and any queries that may arise. PhD students could also assist with the event as agreed with the organiser.

For online events, the administrative support budget could also include an event moderator (see section 22).

The IAS team can provide guidance in employing extra support and can provide a job description if required



ON-CAMPUS WORKSHOPS

9. Venue and Catering

It is important to secure a venue for the workshop ASAP, as rooms fill quickly during University holiday periods. The IAS team will liaise on your behalf with the [Conference Office](#) to secure a venue and will then hand over to your workshop administrator as appropriate.

The Conference Office team will also provide the following service:

- Liaise with catering to arrange required food and refreshments
- Order tables and university tablecloths for catering
- Arrange staffing (to serve catering)
- Provide campus parking permits (see 'parking' below)
- Liaise with the Portering Team to arrange room set-up in required format
- Provide poster boards (a charge applies and these must be ordered)
- Liaise with Security as appropriate

Key points to note when booking your venue and catering:

- *Key deadline dates*

It is essential that when you are committing to a booking contract with the Conference Office you make a note of the key deadline dates in the terms and conditions of booking (such as cancellation dates, confirmation of final numbers) as there will be cost implications if these are not adhered to.

- *Day delegate rates*

Day delegate rates will vary depending upon the space you book (typically £25-£30 per person per day).

- *Delegate minimum numbers*

When booking your venue you will be required to confirm a minimum number of delegates. We suggest that you use the lowest number that you think will attend (it must be at least 10) as the terms and conditions will state that you must pay for this number of delegates. It is possible to increase delegate numbers but not to decrease them.

Final numbers for catering purposes must be provided no later than 10 days prior to the event.

- *Catering only requests*

You may already have a room available that does not need to be booked centrally. If so, you can still use the Conference Office team to order catering and they will therefore still provide the services listed above.

If you wish to organise your own catering (for example, using an external supplier) you will need to advise the Conference Office and may need to complete a Hazard Analysis and Critical Control Point (HACCP) assessment and other paperwork to ensure that due diligence is completed.



- *Alcohol*

If you plan to serve alcohol to guests this must be organised via the Conference Office and you will be required to pay for serving staff. This is University policy. Alcohol can also only be served in licenced areas. If your event is in the Leggett building (a purpose-built conference facility on the Manor Park Campus) it is possible to obtain a licence to serve alcohol. This takes approximately 10 days.

- *Portering*

The Conference Office team will liaise with Portering staff to set up the room to your required layout. All furniture (such as spare tables, whiteboards, chairs) will, however, remain in the room unless you specifically request its removal and book another room for storage of excess furniture for the duration of the event.

10. Accommodation

Accommodation can either be arranged on campus or locally in Guildford. Some workshop organisers charge delegates for accommodation at a higher rate than they are charged (ask the IAS for advice). This profit contributes towards the cost of the event.

Campus Accommodation

[University accommodation](#) can be booked via the [Conference Office Team](#) and is available from one week after students leave in June until the second week of September. July is a particularly busy month so it is essential to book early. The accommodation provides single, en-suite rooms with breakfast included.

The Conference Office will provide full terms and conditions at the time of booking, but it is important to note that once accommodation has been booked you are committed to filling those rooms. The number of rooms booked can be reduced if done more than three months prior to the event. **However, if room numbers are amended within three months of the event then cancellation charges will apply.** Rooms can be added to a booking at any time but are subject to availability and therefore not guaranteed.

Outside late June to mid-September it may be possible to book some rooms via the Accommodation Office. They have a limited number of rooms available throughout the year but, again, you will need to book early.

Off campus Accommodation

If using local, off-campus accommodation there are a number of local hotels that are approved suppliers of the University and offer special discounted rates. These can be booked via Purchase Order which is the Finance Team's preferred method. If the supplier is not listed on Agresso, rooms can be booked using a Departmental Purchase Card.



Hotels

[Holiday Inn Guildford](#) GU2 7XZ (An approved University supplier)

For block bookings please call the Holiday Inn Guildford directly and quote 'University of Surrey' when booking, on +44 (0)871 423 4876. When booking you can mention the University of Surrey and request the booking is invoiced. Prices vary depending on night required and availability. Typically range from £95 - £150 B&B.

[Asperion Hotel](#) GU2 7PF (An approved University supplier)

A popular choice - small, boutique hotel offering very reasonable rates and within easy walking distance of both University Campus and Mainline railway station. Typical B&B rate £89-£99.

[Mandolay Hotel](#) GU1 2AE (An approved University supplier)

A four-star boutique hotel at the top end of the High Street. Approx 35-40 minute walk from campus. Very close to Guildford London Road railway station. Typical B&B rate £114.

[Angel Hotel](#) GU1 3DP (An approved University supplier)

A small, historic hotel situation on Guildford High Street within walking distance of both University Campus and mainline railway station. Typical room only rate £112.50.

[Premier Inn Guildford](#) GU1 1UP (An approved University supplier)

Prices vary. Check online – group booking discounts may also be possible. Booked online using a Purchase Card.

[Travelodge Guildford](#) GU1 1BD

Prices vary. Check online – group booking discounts may also be possible. Booked online using a Purchase Card.

Local B&B Accommodation

The following private B&B accommodation has been used and reviewed positively in the past and offers reasonably priced, local accommodation.

[Plaegan House](#) (An approved University supplier)

[Patcham B&B](#) (An approved University supplier)

[Airbnb](#) is also worth considering.

11. Travel

It is usual for invited keynote Speakers to have their travel costs covered. In special circumstances, organisers may book travel for speakers (where possible, this should be booked via Ian Allen Travel). Booking travel can be time consuming and take significant administrative resource. It is easier to arrange for speakers to book their own and get reimbursed by submitting all receipts with a [Visitor Expense Claim form](#). Expenses must comply with the University's Expense policy. This form will need to be approved by the budget holder and then sent to Finance Services for payment.



12. Workshop Dinner/Evening Events

The workshop dinner can be either on or off-campus. The Conference Office can arrange evening events on campus or Lakeside is a popular choice, offering excellent food and wine options. Alternatively, there are many good local restaurants that can host the event. A number of local restaurants are already approved suppliers (found on Agresso) and events can be paid for via Purchase Order.

The IAS can provide recommendations if requested.

If transport is required to take delegates to the dinner venue Beeline Cars (the official University Supplier) should be used. You will need the relevant PO number and can then book taxis and/or buses on account.

13. Audio Visual Equipment

Most rooms have AV equipment as standard and this can be checked at time of booking. If you have specific additional AV requests we suggest you book this via the AV team as soon as possible by completing the [AV request form](#).

14. Parking

If you have booked your event through the Conference Office the team will provide you with complimentary parking permits for your delegates. These state that they are first come, first served although there is usually plenty of availability outside Semester time.

If you are organising the event independently and the Conference Office is unable to provide parking permits you will need to contact the transport team to arrange Visitor permits.

15. Delegate Communication

Although much of the information about the Workshop will be on the event micro-site hosted on the IAS website, we recommend that you send detailed joining instructions to all delegates approximately two weeks prior to the event. Some delegates may drop out at this point and you will know this before final numbers need to be confirmed 10 days prior to the event. The IAS can provide example joining instructions.

16. Badges & Welcome packs

We suggest that you create name badges for all speakers and delegates. These can be in the form of clip and pin badges or, for a more sustainable option, lanyards.

Plastic badge cases can be ordered from Office Depot and the IAS can provide a Word template so that you can print them yourself. The standard size for these is 90mm X 60mm.



The IAS will provide free delegate brochure covers. You may also wish to include some University branded merchandise (such as pens, notepads etc). These should be ordered via Appleseed Bookshop.

17. Final Preparations

We suggest that you prepare the following in advance of the event and have them ready at Workshop Registration:

- Badges or lanyards – in alphabetical order
- Welcome packs – to include programme and any other literature or merchandise being provided
- List of delegates
- Visitor expense forms
- Spare parking permits
- Campus maps
- Details regarding how to log on to the Guest WIFI

It is worth checking with the conference office whether you will be sharing open spaces (such as foyers) with other University users. If so, we suggest that you make contact with the other party to ensure there is no confusion on the day regarding registration location, event signage etc.

Plan and prepare signage for the workshop to enable delegates to easily find the event registration. We suggest identifying points for signage in advance and printing A3 posters. (Do not forget to remove them after the event.)

18. During the Event

The IAS requires that delegates complete Evaluation forms which must be collected by organisers and submitted to the IAS team after the event. These are important in enabling the IAS to evaluate individual events as well as informing the organisation of future events.

Organisers are encouraged to take photographs for inclusion in the event report and the IAS Annual Review and on the IAS twitter feed - **@IAS_SurreyUni**.

In agreement with the organiser, the IAS will record short video clips with speakers where possible.

19. Post workshop activities

As a condition of funding, the IAS Board wishes to ensure that the results from workshops are visible on the IAS's web site. It therefore requires that, not more than 8 weeks after the workshop, organisers submit a report in the form of one or more pages describing the programme, summarising the progress made during the workshop and linking to the speakers' presentations / abstracts, including photographs where possible. The text should be supplied as a Word document.



The IAS will create the workshop report pages.

At the same time, organisers should provide a brief financial account indicating how the IAS's financial contribution was spent and how much funding from other sources was obtained.

Twelve months after the workshop and thereafter whenever organisers have news, they should provide information about the workshop outcomes (articles, research proposals, further meetings, etc). This information will be made available on the IAS website and in the Annual Review.

VIRTUAL WORKSHOPS

20. Planning your virtual event

Effective planning is incredibly important when hosting a virtual event. The format of your event will depend on why you are holding the event, what you hope you achieve and who will be attending.

Some considerations when planning the format of your event include:

- Consider running several short sessions with plenty of breaks and also engagement activities to avoid 'screen fatigue'.
- Consider how to make your event accessible across time zones. It might be that overseas participants will need to catch up by watching recorded talks overnight.
- Ensure that all speakers, moderators and admin support staff are fully briefed. Never assume all speakers will know how to do something such as sharing slides/screen.
- Have a separate communication channel in addition to the main session (for example, Slack).
- Ensure that event organisers have a separate channel of communication (for example as a dedicated Slack channel or a WhatsApp group).
- Hold a rehearsal before the event to ensure that the technology works as you expect and that everyone is confident of their role.
- Consider using breakout rooms to encourage attendees into small groups to facilitate discussion.
- Build in time and opportunity for networking – via a separate social event or during the programme using break out rooms and discussion forums.
- If you are recording talks, ensure that the speakers are happy with this and set very clear parameters regarding whether these are shared externally or kept private.

Useful sources of information also include a [Virtual events tool kit](#), which has been produced by the University Events Team and [this online article: 'How to run a virtual event'](#).



21. Virtual platforms and technical considerations

It is assumed that, as the Workshops are likely to include a limited number of participants to promote collaboration and discussion, Zoom or MS Teams would be the most likely virtual platforms used.

The University also has licences for Zoom Webinar and MS Teams live. These platforms are both more suitable for events hosting larger numbers but reduce interaction between participants.

If you are unsure which platform to use, please contact the IAS team. Please also be aware that the platforms for larger audiences will require a licence.

Some key considerations include:

- Ensure that you have more than one event 'host' in case of technical issues and that all hosts have appropriate account permissions and reliable WiFi connections.
- Collate copies of all planned presentations so that you can share these in the event that the speaker is unable to do so.
- Encourage all participants to mute and to turn off their video screens during presentation to prevent technical interruption.
- If recording talks, it is easier to record as separate chunks rather than to edit one long recording afterwards.
- Consider where you will host your recordings if you plan to share them (this could be via social media, YouTube or by sending links directly to attendees. One suggestion would be to set up a private YouTube channel which you can then use to share recordings as required).

22. Event moderation

A strong moderator will play a key role in determining the success of the event.

The role of the moderator will vary depending upon the virtual platform(s) being used but they are likely to be responsible for ensuring the event runs smoothly and to time, for introducing speakers, lining up presentations and chairing Q&A sessions.

Organisers could nominate one moderator for the event or could ask different attendees to moderate different parts of the event. Ensure all moderators are fully briefed in advance of the event.

In addition to a strong moderator, it is a good idea to have extra administrative support lined up to assist with general tasks, such as setting up and overseeing breakout rooms, updating communication channels, recording talks etc.

23. Final preparations

In order to ensure the event runs as smoothly as possible we would suggest that a rehearsal is held (to include the organiser(s), moderator and administrator) at least a week prior to the event. In addition, the following checks should be made:



- Check that all registered attendees have received the relevant online links and are able to access the chosen virtual platform.
- If you are running concurrent sessions, check that there are no problems logging into both sessions at the same time (e.g. if one person is named as host in both sessions it is important to ensure this won't cause any conflict issues).
- Obtain copies of all presentations so that you have access to them if required.
- Set up and test any chosen communication channels, online survey tools etc.
- If you are employing a student to assist and are using Zoom, make sure that their Zoom account has been upgraded to a premium account to enable full access. This can be set up within a couple of hours by the IT team.

24. During the event

The IAS requires that delegates complete online evaluation forms. These are important in enabling the IAS to evaluate individual events as well as informing the organisation of future events.

The IAS team will provide an online survey in advance of the event. Organisers are encouraged to share this in the event communication channels on the last day of the event.

Organisers are encouraged to take screenshots for inclusion in the event report (with permission from delegates) and the IAS Annual Review and on the event twitter feed and the IAS twitter feed - @IAS_SurreyUni.

25. Post workshop activities

As a condition of funding, the IAS Board wishes to ensure that the results from workshops are visible on the IAS's website. It therefore requires that, not more than 8 weeks after the workshop, organisers submit a report in the form of one or more pages describing the programme, summarising the progress made during the workshop and linking to the speakers' presentations / abstracts, including photographs where possible. The text should be supplied as a Word document.

At the same time, organisers should provide a brief financial account indicating how the IAS's financial contribution was spent.

Twelve months after the workshop and thereafter whenever organisers have news, they should provide information about the workshop outcomes (articles, research proposals, further meetings, etc.). This information will be made available on the IAS website and in the Annual Review.

