

Expert Finders Systems Forum and VIVO Conference: Prospectus for Joint Event

Executive Summary

In September 2019, the VIVO Project will hold its 10th annual conference, its first in Europe. Six months earlier, the first National Forum on Expert Finder Systems hosted 75 participants in Orlando, Florida.

These two events have much in common. Nearly half of EFS Forum attendees and several EFS presenters also attend VIVO conferences. Similarly, many of the same vendors sponsor these events. Both EFS and VIVO are open and platform-agnostic and—most importantly—their programs explore many of the same challenges, technologies, and solutions.

These commonalities led numerous EFS Forum participants to suggest that the next EFS event be combined with a VIVO conference. A small team of organizers from both events was created to examine that possibility.

After several discussions, the team agreed that combining the two events would boost attendance, broaden perspectives for both audiences, eliminate duplication of effort on the part of conference organizers, and save time and money for attendees.

The team recognizes there are differences between the events. Specifically, the EFS Forum program emphasized sustainability of expert finder systems, regional economic development, research information, and the promotion of innovation, while the VIVO Conference targets developers, information scientists, and researchers in open scholarship and has more of a global focus. However, in a combined program, these differences could actually create additional opportunities for learning, networking, and solutions on all sides.

The team considered several ways to combine the events, including staging them consecutively in the same location, offering two separate tracks that occur at the same time and location, and fully integrating the two events. After examining and discussing the options, the team decided to recommend two separate tracks with partial integration, i.e., sharing keynote sessions and possibly a few other sessions. Registration, sponsors, and overall planning and logistics would be shared. Participants would be free to attend any session regardless of track. This would maximize the logistical, professional, and intellectual benefits to attendees while maintaining the identity and agenda for each group.

As for the future, depending on the success of the initial event, the two strands could continue to come together regularly on a to-be-determined schedule. For example, with the recent growth of its international members, VIVO could consider hosting conferences outside the U.S. every other year, alternating with a combined VIVO/EFS event in the U.S.

The team's recommendations for a joint event are provided below.

Objectives

Conference organizers from the EFS Forum and the VIVO Project have together identified several shared objectives for a possible joint event, including:

- Holding a budget-neutral or slightly profitable event in a desirable, accessible location
- Partnering with a host university to use its conference facilities
- Making available a variety of hotel and other lodging options
- Appointing a program chair to organize peer-reviewed abstracts for talks
- Offering a day of pre-conference events, plus two days of full-conference presentations
- Offering multiple tracks of keynotes, panels, presentations, and networking events that appeal to both audiences
- Offering a poster session
- Attracting 100-150 attendees

Primary Audiences

The primary audiences for the event are expected to be:

- Expert finder system administrators and staff
- VIVO executives and administrators
- University stakeholders
- State/regional economic development stakeholders
- Expert finder system platform providers
- Researchers in the field of research information management systems and related areas

Dates and Schedule

Proposed Dates

The team is not yet recommending a specific set of dates. The EFS Forum was held in late February of 2019; the next VIVO Conference will be held in September 2019.

The team discussed possible dates in spring 2020, fall 2020, and early 2021. If the event is held in spring 2020, it would be only half a year after the previous VIVO Conference. However, if it is not held until early in 2021, nearly two years will have passed since the EFS Forum.

After an examination of venue costs, availability of hotel accommodations, and other logistical matters, the timing question may be resolved more easily.

Proposed Schedule

The joint conference would be three days long—ideally a Wednesday, Thursday, Friday:

- Day 1: Morning: 2-3 half-day workshops; afternoon: 2-3 half-day workshops. Evening reception.
- Day 2: Opening comments, keynote speaker, sessions/panels, 90-minute lunch. Invited/featured talk/panel after lunch. Two afternoon contributed paper sessions. Evening reception.

- Day 3: Keynote speaker, same schedule as day 2. Possibly ending at noon.

The planning committee will identify the topics of preconference workshops and main conference tracks and sessions to maximize engagement, sharing, and learning on the part of attendees.

Costs

The anticipated registration fee is \$200-\$250. Total expenses are estimated at \$30,000-\$50,000. This estimate is based on expenses (below) for the 2017 VIVO Conference and 2019 EFS Forum.

| VIVO 2017 Costs Summary | |
|--------------------------------------|---------------|
| Expenses (for 125 attendees) | |
| Facility charges, audiovisual, Wi-Fi | 16,350 |
| Food and beverage | 23,743 |
| Speakers, printing, insurance | 8,020 |
| Total | 48,113 |

| EFS FORUM 2019 Costs Summary | |
|-------------------------------------|---------------|
| Expenses (for 70 attendees) | |
| Venue, meals, audiovisual, Wi-Fi | 34,508 |
| Reception | 3,644 |
| Graphic design | 4,837 |
| Keynote expenses (1) | 1150 |
| Total | 44,139 |

Venue

The team identified the following characteristics needed for a venue for a combined event:

Logistical Needs at Venue

- Auditorium for plenary sessions (100-150 people)
- Two to three classrooms/workshop rooms for 40-50 people each
- Space for 12 exhibitors
- Space for poster session (approximately 20 posters)
- Audiovisual capabilities in the auditoriums and classrooms

- Free Wi-Fi access for all attendees during sessions
- Space for breakfast, lunch, and breaks
- Space for receptions
- Small room for group and vendor meetings

The team researched facilities and costs of several venues before deciding to recommend the [Kovens Conference Center](#), part of Florida International University. The team anticipates that staff of the university will provide significant logistical support and may also be responsible for signing a contract with the venue. (Note that the planning committee, once constituted, may explore other possible venues, including venues in other states.)

The Kovens Conference Center is located directly on Biscayne Bay in north Miami. It offers 10 versatile rooms of varying sizes and configurations, plus indoor and outdoor pre-function space. The site is conveniently accessed from I-95 or the Florida Turnpike and is only 30 minutes from either Miami International Airport or Ft. Lauderdale International Airport. The Kovens Center provides customized packages at a fixed per-person, per-day price that typically includes morning and afternoon breaks, continental breakfast, and buffet lunch. Complimentary parking is available. The Kovens Center is certified by the International Association of Conference Centers and uses certified technicians to provide audiovisual support.

A table showing estimated costs of holding the event at the Kovens Center is provided below. These figures represent discounted rates the team hopes to secure because one of the team members is an FIU employee.

Kovens Conference Center, Florida International University

| Kovens, FIU, Miami | Cost | 100 people | 150 people | 200 people |
|---------------------------------|-------------------------------|--------------|--------------|--------------|
| Basic conference package | $((67*2)+51) * \#people$ | 18500 | 27750 | 37000 |
| General session room | Included | | | |
| Breakfast, lunch, breaks | Included | | | |
| Gallery exhibits, posters | Included | | | |
| Large breakout rooms | 747*3 rms*3 days | 6723 | 6723 | 6723 |
| Wi-Fi service | Included | | | |
| AV general session | Included (LED, screen, Wi-Fi) | | | |
| AV breakout rooms | \$250*3rm*3days | 2250 | 2250 | 2250 |
| Technicians | (Gen. included) \$40*9hr*3 | 1080 | 1080 | 1080 |
| Total | | 28553 | 37803 | 47053 |
| Dinner buffet | \$47/person | 4700 | 7050 | 9400 |
| Reception food only | \$25/person | 2500 | 3750 | 5000 |
| Open bar (beer & wine) 2 hrs. | \$19.95/person | 1950 | 2925 | 3900 |
| Open bar (full) 2 hrs. | \$29.95/person | 2950 | 4425 | 5900 |
| Bar service police officer | \$60*2 officers | 120 | 120 | 120 |
| Bar service liability insurance | \$250 | 250 | 250 | 250 |
| Parking space reserve | | | | |
| Bus | | | | |

Hotel Accommodations

The venue does not have an attached hotel, so the team suggests either making simple arrangements for “recommended” hotels, possibly with a reduced rate, or actually signing a contract to guarantee a certain number of rooms at a reduced rate at an area hotel.

Refreshments

- Breakfast each day (including some protein)
- Coffee mid-morning each day (or all-day refreshments)
- Lunch

- Drinks and snacks mid-afternoon each day
- Wine/beer receptions with hors d'oeuvres Wednesday and Thursday evenings

Attendees would have dinner on their own. Numerous restaurants are located within two to five miles of the suggested venue.

Sponsors

The event would welcome all sponsors—corporate, academic, and nonprofit. The VIVO Conference typically attracts 7-10 sponsors, providing \$20K-\$30K of revenue. The EFS Forum attracted approximately \$34K in sponsorships and in-kind contributions, with another \$11K coming from registrations.

As previously mentioned, the EFS and VIVO events have had several sponsors in common. A joint event could be even more appealing to potential sponsors, who would be getting a good return on their investment by reaching both audiences with one sponsorship.

Organizing Committee

With approval from the VIVO Leadership Group and the EFS Forum Steering Committee, the team will recruit members for a conference organizing committee that includes the following chairs:

- Conference co-chairs (one each from VIVO and the EFS Forum)
- Venue and logistics
- Sponsorship
- Program
 - EFS Program
 - VIVO Program
- Marketing and communication
- Digital and print asset support
- Budget and accounting

Planning Milestones (depending on event date, these may change)

- 12 months out: finalize location and date, draft budget, timeline
- 11 months out: write sponsorship prospectus, invite keynote speakers
- 10 months out: announce event (save the date), write all communications, send monthly promotional emails
- 8 months out: publish call for papers
- 7 months out: open registration, announce keynotes
- 3 months out: publish program
- 2 months out: send biweekly emails
- 1 month out: send weekly emails with travel information