Open Repositories Conference Handbook

Introduction

This document is intended to serve both as an aide-memoire for the Open Repositories organization and as a loose guide for each year's conference organisers. It is offered as guidance only and is provided "as is" without any warranty as to accuracy or completeness.

Following the overview, the middle sections of the document are essentially a walk through of the conference "creation" process whilst the Appendices contain related documents that will be useful in the process.

The Open Repositories Vision

The annual international Open Repositories Conference occupies a unique place in the landscape of open knowledge, open source and digital preservation conferences. Acknowledging institutional interests in the vital role open repositories play in preserving and creating access to scholarly outputs, the OR focus on "how to" rather than "how come" has made it a favorite among librarians, developers and repository managers among others. OR is the conference where attendees learn about formative techniques and technologies while connecting with people who are solving related issues at their institutions. OR provides participants with an informal look at current community practices and future repository trends combined with collegial networking opportunities. This dynamic makes this conference the preferred event for people who have on-the-ground responsibilities for stewarding institutional digital resources.

Open Repositories Organization

The Open Repositories Steering Committee (OR SC) is the organizing group whose members have deep knowledge of the open repository space. The OR SC identifies future conference sites and host organizations, selects a programme committee in a process that is independent from that of selecting a conference site, helps to reach out to potential sponsoring organizations, manages scholarships, maintains the code of conduct and associated documents, develops policies, coordinates the work of presenting the conference each year, and is responsible for managing the OR finances (made up of surpluses from previous conferences and used for scholarships). The OR SC meets monthly (via conference call) or more often as needed. The OR SC is made up of permanent members as well as the Program and Host Chairs. Program and Host chairs rotate off of the OR SC when their responsibilities are complete. There may be some items which only the permanent members may act on such as the decision on a bid to host. The OR SC elects a Chair and Vice-Chair for terms of two years. Generally, the Vice-Chair moves into the Chair position at the end of Chair's term, and a new Vice-Chair is elected.

The Open Repositories Host Organizing Committee (OR HOC) changes with each new venue and is responsible for managing the conference logistics including the venue, accommodations, receptions and dinners, sponsorships, and the budget. Generally the chair(s) of the Host Organizing Committee are named when the bid for hosting is put forward; the chair is then responsible for naming the remainder of the committee. The OR Host Organizing Committee Chair(s) (selected by the Host organization) attend the monthly OR Steering Committee meetings, and work closely with the OR SC and the OR Program Committee Chair(s).

The Open Repositories Program Committee (OR PC) changes with each new venue and is responsible for managing the program including building a program committee with chairs for each track, identifying the theme of the conference, issuing the call for proposals, identifying and inviting keynote speakers, managing the peer review process, selecting proposals for presentation, and establishing the program schedule. The Chair(s) - generally there are at least two - are selected by the Steering Committee; the Chairs then select members of the committee. The OR Program Committee chair(s) attend the monthly OR Steering Committee meetings, and work closely with the OR SC and the OR Host Organizing Committee Chair(s).

Specific responsibilities of each group are outlined below.

Responsibilities of the Steering, Program, and Host Committees

Steering Committee (SC) responsibilities

The current Steering Committee list can be found at: http://www.openrepositories.org/steering-committee/

- Recruitment and selection of host organizations and institutions via the Expression of Interest (EoI) and bidding process.
- Recruitment and selection of Program Committee Chair(s).
- Setting of policies and guiding documents that apply across OR conferences such as the Code of Conduct.
- Approval of the theme, Call for Proposals (CfP), and overall structure of the conference as put forward by the Program Committee Chair(s).
- Oversight and management of the Open Repositories Code of Conduct and Anti-Harassment Policy
- Conducting monthly meetings via conference calls.
- Setting and meeting timeline for conference activities. (See the Annual Cycle).
- Subscription to submissions website (ConfTool) and management of personal data within.
- Oversight of reserve funds.
- Oversight of scholarships selection and awards. Coordinate with the Host Organizing Committee for travel arrangements for the full fellowship.
- Support for solicitations for fund-raising / sponsorship to previous & new donors in conjunction with Host Organising Committee. Identification and maintenance of links with allied / affiliated groups for cross-promotional mktg, program activities, etc. (e.g., SPARC, COAR, CNI, IASSIST).
- Selection of new SC members;
- Election of OR SC Chair, Vice-Chair, and other officers.
- Communication about the conference, including the CfP, EoI, registration calls, etc.Maintenance of Conference Handbook and Knowledge Base (i.e. the OR Steering Committee wiki).
- Management of membership and charge of standing subcommittees including the Finance, Scholarship, and Code of Conduct subcommittees.

Host Organization Committee (HOC) and Chair(s) responsibilities

The Host Organization Committee and chair(s) is generally selected by the hosting institutions.

- Selection of conference venues and accommodations.
- Establishment and monitoring of budget for the conference.
- Engagement of a professional conference organizer if desired.
- Management of conference registration and fee collection.
- Maintenance of conference website and mobile program app or interface.
- Maintenance of submissions website (ConfTool).
- Use of the OR Twitter account to communicate about the conference (see https://twitter.com/OR2018MT for example) and to respond to questions and issues.
- Use of the Open Repositories Facebook account to communicate about the conference and respond to questions and issues.
- Provision of visa letters to attendees as needed.
- Arrangement of travel for scholarship recipient if needed. Travel costs will be reimbursed by OR via CLIR.
- Arrangement of travel and payment of honorarium for the keynote speakers.
- Management of relationship with conference organizers (if used), venue staff, and others key to the logistics of the conference.
- Work with the Program Committee on holistic plan for overall program, flow, and logistics.
- Promotion of the conference via social media.
- Organize and coordinate any A/V needs for presentations, event recording, live streaming, and other related services.
- Development of a sponsorship prospectus.
- Identification and engagement of sponsors in financial support of the conference in collaboration with the OR SC as needed.
- Planning and coordination of meal services throughout conference.
- Protocol for managing Code of Conduct violations in collaboration with the Code of Conduct subcommittee of the OR SC.
- Management of issues regarding logistics (A/V, wifi, food, venue, etc.) that come up during the conference itself.
- Administration of a survey assessing success of the conference using a standard tool in use by the OR SC.
- Post-conference feedback to the OR SC and Conference Knowledge Base (attendance statistics, financial report).
- Submission of the conference Web site to the Internet Archive's crawls, for long-term access to its contents.
- Feedback to SC for improving and evolving the Conference Handbook.
- Return of any profits to OR reserve fund as soon as feasible after the conference.

Program Committee (PC) and Chair(s) responsibilities

The Program Committee Chairs are appointed by the OR SC. The Chairs populate the Program Committee with members. Some members may be responsible for a specific track (posters, 24x7, developers, etc.). The Program Chair(s) generally shape the theme and Call for Proposals first, and then appoint a Program Committee. The Chairs have ultimate responsibility for determining the program for OR.

- Identify theme(s) of conference with approval by the OR SC.

- Work closely with the HOC to ensure information is posted on conference website and submission system is established and open when the CfP is released.
- Produce and publish the Call for Proposals (CfP) with approval by the OR SC.
- With support from Steering Committee, set timeline for submission, review and notifications
- With support from Steering Committee, identify Track Chairs (e.g., Workshops, Developer track, Ideas Challenge, Posters, 24x7, etc.).
- Establish guidelines and expectations for each category of submission.
- With HOC establish expectations for posters (electronic only? If printed, what size?). There may be constraints on numbers given size of venue.
- With support from Steering Committee, recruitment of appropriate reviewers.
- Management of review and selection process for all content for the conference.
- With HOC determine number of acceptances possible given rooms available.
- Once reviewing and review is complete, alert proposers of the status of their submissions.
- Identify workshops to be offered early in the process so that they can be included in the registration process (which typically opens before the program is set).
- Set schedule for the conference.
- With approval from the OR SC, identify, communicate with, and manage the keynote speakers. Arrange with the HOC the travel and honorarium.
- Management of website for submission, review, and acceptance procedure (in coordination with HOC).
- With the Steering Committee Chair and Vice-Chair and Chair of the HoC, plan the opening and closing plenary sessions. Provide a slot at the end of the conference for next year's HOC.
- Feedback to SC for improving the Conference Handbook.

Open Repositories Resources

Wiki and Website

The OR SC maintains a website at http://openrepositories.org/. This website is public facing and contains a current list of SC members as well as announcements relevant to OR conferences such as a CfP, etc. The OR SC may also use this to publish policies or statements that they want to make public.

The OR SC also maintains a wiki, hosted by Duraspace, at https://wiki.duraspace.org/display/or11/OR+Steering+Committee+Home. The wiki has some public information, but in the main is used by the OR SC and associated Program and Host Chairs as a knowledgebase for tracking OR SC meeting minutes, internal conference planning, distribution lists, etc. While conference planning may take place using other tools such as Google Drive, all material that is important for documenting a conference should be moved to the wiki when possible. The list of items that should be transferred is in Appendix D.

Conference Program Management Tool

The OR SC maintains a license for ConfTool as of 2018 in order to have consistency across conferences and to ensure data is transferred between instances as allowable.

Communication Channels

The OR SC maintains a listserv that is used for regular communication amidst SC members. The OR SC also uses a Slack channel for communications.

Social Media

As of August 2018, there is one twitter account (http://twitter.com/openrepositories) that is passed from each Host Organizing Committee to the next, and can also be used by the Steering Committee to communicate as needed. The Steering Committee also maintains a Facebook site (https://www.facebook.com/ORConference/) that is also used by the Host Organizing Committee.

OR Reserve Fund

If there are excess funds at the end of an OR conference, those funds are transferred into a reserve fund that is held by the Council on Library and Information Resources (CLIR). The fund itself is monitored and managed by the OR Finance Subcommittee. The reserve fund is generally not used to fund or support a host organization except under extraordinary circumstances, but is generally used to fund expenses such as:

- the provision of scholarships to assist the attendance of individuals (usually from the developing world) who would would not otherwise be able to attend and whose circumstances deserve special attention;
- administrative costs such as web site hosting and domain management;
- the provision of a particular prize or prizes as part of the conference proceedings;
- assistance in the case of extraordinary circumstances; and/or

whilst it is the host institution's responsibility to make appropriate insurance arrangements, the Steering Committee would be willing to consider requests for additional assistance from this fund in the event that, for example, closure of national airspace resulted in the conference having to be cancelled.

Open Repositories: Past, Present, and Future

The first Open Repositories Conference was held at the University of Sydney in 2006. Since then attendance at the conference has grown steadily as the role repositories play in the landscape of scholarly communication, open source software development, open access, and digital preservation has evolved over the past decade. The conference is known for creating a lively and informal atmosphere where users and developers of open digital repository platforms come together to share formative solutions and best practices.

The inaugural 2006 Open Repositories Conference consisted of a Forum entitled "The Well-integrated Repository" and a Symposium called "Managing Openness". Since then conference programs have featured main conference presentations and panel discussions, poster sessions with accompanying minute madness session and 24/7 fast-paced presentations. Workshops and meetings are often scheduled around main conference sessions. Tracks focused on specific platforms such as DSpace, Fedora, ePrints, Invenio, and Samvera, are now integrated within the main conference sessions. A developer track - coming out of the one time Developer Challenge - is focused on more technical challenges and solutions. The Ideas Challenge - an evolution of the Developer Challenge - has become a favorite among conference-goers who are invited to compete to come up with solutions for current repository issues. Social events and informal get-togethers surrounding the conference provide opportunities for new and old colleagues to collaborate on advancing repository community development efforts.

Past Conferences

Sydney, Australia, 2006

- Conference web site: http://apsr.anu.edu.au/Open_Repositories_2006/
- Attendance: 150
- Number of presentations: 44 in general and interest groups

San Antonio, 2007

- Conference web site: https://web.archive.org/web/20070715172642/http://www.openrepositories.org/2007/ (from the Internet Archive)
- D-Lib Magazine report: Second Annual Open Repositories Conference (OR07) in San Antonio: http://www.dlib.org/dlib/march07/morris/03morris.html
- Program Chair: Sayeed Choudhury
- Attendance: 357
- Number of presentations: 62 in general and interest groups; 32 posters

Southampton, 2008

- Conference web site: http://or08.ecs.soton.ac.uk
- D-Lib Magazine report: Strands of a Global Web of Knowledge Come Together at the Third International Open Repositories Conference 2008: http://www.dlib.org/dlib/may08/morris/05morris.html
- Program Chair: Liz Lyons
- Attendance: 400+ from 35 countries
- Number of presentations: 67 in general and interest groups; 51 posters

Atlanta, 2009

- Conference web site: https://web.archive.org/web/20160520003525/https://or09.library.gatech.edu/ (from the Internet Archive)
- D-Lib Magazine report: Doing So Much More: The Fourth Annual International Conference on Open Repositories (OR09): http://www.dlib.org/dlib/july09/morris/07morris.html
- Twitter Feed:
- Program Chair: John Howard
- Attendance: 331 from 23 countries
- Number of presentations: 94 in general and interest groups; 38 posters; 5 workshops

Madrid, 2010

- Conference web site:https://web.archive.org/web/20141217115406/http://or2010.fecyt.es/publico/Home/index.aspx (from the Internet Archive)
- Conference proceedings: http://journals.tdl.org/jodi/index.php/jodi/issue/view/180
- Conference repository: http://biecoll.ub.uni-bielefeld.de/abfrage_collections.php?coll_id=56&la=en
- D-Lib Magazine report: Making Repositories Mean More: Report on the Fifth International Conference on Open Repositories 2010: http://www.dlib.org/dlib/september10/morris/09morris.html
- Twitter feed: https://twitter.com/OR2010info
- Program Chair: Wolfram Horstmann
- Attendance: 400+ from 36 countries
- Number of presentations: 86 in general and interest groups; 44 posters; 5 workshops

Austin, 2011

- Conference web site: https://web.archive.org/web/20160812141128/https://conferences.tdl.org/or2011/index.php/OR2011/OR2011main
- D-Lib Magazine report: Open Repositories 2011: Community Meet-up in the "Live Music Capital of the World": http://www.dlib.org/dlib/july11/morris/07morris.html
- Twitter feed: https://twitter.com/OR11_Austin (note that it appears to have been hacked)
- Program Chair: Tom Cramer
- Attendance: 300+
- Number of presentations: 70 in general and interest groups; 30 24x7; 36 posters; 11 workshops

Edinburgh, 2012

- Conference web site: http://or2012.ed.ac.uk
- D-Lib Magazine report: 4,000+ Tweets Later: Looking Back at the Seventh International Conference on Open Repositories: http://www.dlib.org/dlib/september12/morris/09morris.html
- Twitter feed: https://twitter.com/OpenRepos2012
- Program Chairs: Kevin Ashley
- Attendance: 460 from 40 countries
- Number of presentations: 87 in general and interest groups; 39 24x7; 62 posters; 14 workshops

Prince Edward Island, 2013

- Conference web site: http://or2013.net
- D-Lib Magazine report: 2013 Open Repositories Conference Highlights: Repository Island in Sea of Research Data: http://www.dlib.org/dlib/september13/morris/09morris.print.html
- Twitter feed: https://twitter.com/OpenRepos2013
- Program Chairs: Jon Dunn, Sarah Shreeves
- Attendance: 305
- Number of presentations: 82 in general and interest groups; 22 24x7; 28 posters; 8 workshops

Helsinki, 2014

- Conference web site: http://or2014.helsinki.fi/
- CLIR Report: Opening Open Repositories: http://connect.clir.org/blogs/jon-dunn/2014/06/26/opening-open-repositories
- Twitter feed: https://twitter.com/OpenRepos2014
- Program Committee: Tom Cramer, Mike Giarlo, Simeon Warner
- Attendance: 485 from 37 countries
- Number of presentations: 90 in general and interest groups; 34 24x7; 54 posters; 19 workshops

Indianapolis, 2015

- Conference web site: http://www.or2015.net
- Twitter feed: https://twitter.com/OR2015Indy
- Program Chairs: Holly Mercer, William Nixon, Imma Subirats
- Attendance: 408 from 27 countries
- Number of presentations: 72 in general and interest groups; 10 developer track; 26 24x7; 53 posters; 10 workshops

Dublin, 2016

- Conference web site: https://wayback.archive-it.org/7741/*/http://or2016.net/
- Twitter feed: https://twitter.com/OR2016Dub
- Program Chairs: David Minor, Matthias Razum, Sarah Shreeves
- Attendance: 477 attendees from 38 countries
- Number of presentations: 87 in general and interest groups; 19 developer track; 34 24x7; 40 posters; 15 workshops

Brisbane, 2017

- Conference web site: https://web.archive.org/web/20171119044524/https://or2017.net/
- Twitter feed: @or2017aus - was handed over to Bozeman so is now part of @OR2018MT
- Program Chairs: Elin Stangeland, Andrea Schweer
- Attendance: 331 attendees from 28 countries
- Number of presentations: 70 in general and interest groups; 14 developer track; 44 24/7; 46 posters; 10 workshops

Bozeman, 2018

- Conference web site: http://www.or2018.net/ or https://web.archive.org/web/*/http://www.or2018.net/
- Twitter feed: https://twitter.com/@OR2018MT/
- Program Chairs: Claire Knowles; Evviva Weinraub
- Attendance: 350ish
- Number of presentations: 48 in general track (no interest groups); 11 developer track; 34 24/7; 39 posters; 13 workshops

(Note: In 2016, the University of Miami ran a crawl across all Open Repository Conference websites in order to keep this information accessible even if the host institution discontinues support for the website. See https://archive-it.org/collections/7741)

Preparing a Bid

General expectations

To host the conference potential organizations should expect to meet certain general standards.

Access to high speed wireless Internet is required to enable communications and aspects of the program. OR conference goers are hyper-connected to the Internet and use multiple devices. Many will need Internet connections to present, some have ongoing coding responsibilities during the conference, still others need to track correspondence while attending the conference, and live demonstrations remain an integral part of conference proceedings. In 2012 more than 4,000 tweets spread news of conference-happenings to those around the world who could not attend.

Providing some combination of meals (lunch), snacks and receptions during the conference as part of the cost of registration is an OR tradition. Meals present key networking opportunities and attendees look forward to connecting with new and old colleagues while enjoying local food specialties. Some OR participants are on limited travel budgets so in-house food and beverages help to make it possible for them to attend. Some hosts have chosen to require payment for attendance at the conference dinner; this will depend on costs and venues.

Providing access and information for a range of types of accommodations is expected. Depending on the whether the main conference will be held on a campus or at a hotel conference center there are often blocks of rooms available at a discounted price. Because OR is held in summer months some host organizations have made low-cost dormitory accommodations available to attendees. These considerations along with access to local listings for other types of accommodations for those traveling with family members are appreciated.

Providing access and information about local transportation options is expected. While OR attendees make their own travel plans, guidance and "insider" information is helpful particularly for those traveling from one remote location to another.

Return flights to/from European destinations are generally much cheaper if the stay includes a Saturday night (transatlantic eg $1200 instead of $3000). Organizers should try to ensure that negotiated hotel rates extend from the Saturday before the conference to the Saturday after inclusive.

Planning for some amount of recording or live streaming of conference sessions is preferred. Because there are eager potential OR attendees who would like to have access to conference content even if they cannot attend, planning to make the conference as accessible as possible for as many people as possible is a key concern.

Working with the OR Subcommittee on the Code of Conduct and Anti-Harassment Policy to respond and manage any reported issues or questions concerning the Code of Conduct and the Anti-Harassment Policy. Please see Appendices A and B for the policies, and Appendix C for the protocol.

Planning a special event that highlights aspects of local history and culture is a part of the OR tradition. From castles to galleries, museums and aquariums OR attendees look forward to an evening out with friends and colleagues while sampling local cuisine and traditions. Events should be as accessible as possible; see the Digital Library Federation's Social Event Checklist for a good guide to ensuring events are welcoming to everyone.

Expression of Interest

The current pattern is that the OR Steering Committee will publish a request for "expressions of interest" (EoI) in the winter two years before the conference is due to take place (so, for example, Winter 2018 for the 2020 summer conference).

The EoI itself should be fairly brief (1-2 pages, or email length), and must include:

    a.   the name of the institution (or institutions in the case of a joint bid)

b. an email address as a first point of contact

c. the proposed location for the conference venue with a brief paragraph describing the local amenities that would be available to delegates, including its proximity to a reasonably well-served airport

After the closing date the OR Steering Committee will examine the EoIs and invite one or more institutions to submit a detailed bid. The choice of which EoIs are followed up will be influenced by a number of factors, including:

- Where in the world?

  In recent years the conference has tended to alternate between a location in Europe and a location in North America as these are the areas from which the vast majority of conference delegates come. However, in 2017 OR was held in Brisbane, Australia, and the Steering Committee remains interested in a diversity of locations for the conference. Please refer to our Statement on Openness and Inclusion: http://www.openrepositories.org/2018/02/27/open-repositories-statement-on-inclusion-and-openness/ (also Appendix F).

- Likely cost to delegates

  For many OR delegates the cost of attending a conference is significant - especially where transcontinental air travel is involved. The OR Steering Committee must consider the proposed location of a conference in terms of both travel costs and likely accommodation costs (although this latter would become clearer when a detailed bid is submitted).

- Logistics

  Related to the first two points, the Steering Committee will make some assessment of the proposed location in terms of proximity to a reasonably well-served airport and in terms of the likely amenities available to delegates in the area of the conference venue. So, whilst the EoI need only be a short email, it will be helpful to the committee that it contain a brief paragraph outlining the benefits of the proposed venue in these terms.

- Host organisation

  The Steering Committee will consider the experience of the host institution in participating in past OR conferences and in the repository community more broadly, as well as the host institution's experience in organising similar large conferences and events.

Preparing a Detailed Bid

Resources

There is a range of resources available to those who are invited to submit a detailed conference bid. In particular, bidders will be given access to the successful bids submitted in previous years and, where available, financial summaries prepared after each conference showing the actual expenditure. This handbook is also meant to be a resource to help ensure the bid meets the expectations of the OR SC. The OR SC contains a number of individuals who have direct experience of preparing a successful bid for and, subsequently, hosting a past OR conference; they too are a resource that can be called upon if required.

Fiscal Responsibility

It is not the intention that hosting OR should be a financial burden on the organising institution. Theirs should be a contribution in kind - providing staff time, and associated facilities, to organise and manage the event; the conference fees and sponsorship income should cover all other expenditure. That said, the OR SC recognizes that many organizations may have to put significant funds towards reserving a venue, for example, well prior to recouping the costs. The bidder should be cognizant that they will be bearing the financial risk of putting these funds forward and potentially of bearing a loss if the conference does not meet targets of sponsorship and registration. All but one OR conference have made a profit. Please note that it is part of the host's agreement with the OR SC that any such profit be passed back to the OR reserve fund for the benefit of future events. It is not the intention that this fund be used to subsidise an unprofitable conference unless extraordinary circumstances can be cited.

Ultimately, since there is no legal Open Repositories organisation, the hosts are putting on a conference and using the Open Repositories branding. It follows that the hosts must take fiscal responsibility for any contracts that they enter into during the course of conference organisation and must ensure that they are covered by any appropriate insurances (including liability insurance).

Elements of the Bid

The Steering Committee anticipates that the financial element of a bid will be supplied as an Excel spreadsheet or similar. It should cover the costs of all aspects of the conference that will require funding. It should include a reasonable estimate of income from sponsorship (based on previous years' actual figures), and it should break even based on a realistic but conservative estimate of attendance. It is the responsibility of bidding institutions to consider past bids in detail and come up with their own itemised list, but it should include the following:

- Daily meals and refreshment breaks
- Two-three evening events (on other evenings delegates make their own arrangements) - see https://www.diglib.org/dlf-events/dlf-social-event-checklist/ for a useful set of guidelines on social events
  - Ideas Challenge Reception (often underwritten by a sponsor)
  - Poster reception

- Banquet dinner
- Travel, accommodation costs, and a small honorarium (usually about $1000) for keynote speakers
- Conference venue rental and associated costs (if not provided for by the host)
- Facilities rental and setup (AV equipment etc)
- Website costs (if not provided for by the host)
- Proposal submission site (ConfTool, for example) costs
- Event recording/streaming costs
- Conference 'swag' including printed programmes, badges etc
- Transportation costs (if applicable, perhaps to/from banquet)
- Insurance costs (if applicable)

Elsewhere within the bid document, the following is appropriate:

- Brief details of other conferences that the team has organised
- Proposed dates for the conference (see below)
- Details about the campus and/or city hosting the conference (this may well be scans of an official brochure)
- Details of the hotels that are likely to be used by delegates with approximate costs and a statement that there will be sufficient accommodation available during the proposed dates (see below)
- Details of the conference venue (see below)
- Details of the workshops venue(s) if different (see below)
- Details of the proposed Host organizing committee
- Details of the proposed conference website
- Ability to provide visa letters to attendees as needed
- Evidence that the institution would be able to arrange travel for the scholarship recipient in case the recipient would not be able to do that themselves (this cost would be reimbursed to the institution)

The bid should not exceed 15 pages. Any further details can be provided in appendices if necessary.

These are not intended to be complete or exclusive lists and are offered only for guidance.

Dates and structure

The organizers should ensure that the dates they propose for the conference do not clash with any events that might potentially draw from the same pool of delegates (remembering that delegates come from a number of countries) and ideally do not include national holidays for any of the major countries represented by delegates.

From 2015, the Open Repositories event has spanned four days, Monday to Thursday, with the first day being given over to workshops. The main conference has then typically filled 3 days.

Hotels

The hotels recommended to delegates should be reasonably priced and be within comfortable walking distance of the conference venue. As they are attending a technology conference, delegates will expect that all rooms will have free internet.

In arranging discounted rates with local hotels, organisers of conferences should try to ensure that negotiated special rates include the Saturdays before and after the conference. In particular, return flights from European destinations are generally much cheaper if the stay includes a Saturday night (transatlantic eg $1200 instead of $3000) but the "Saturday night rule" is evident in airfares elsewhere too.

The conference venue

The conference venue should have a single meeting space comfortably big enough to accommodate all the delegates during plenary sessions. It should have further rooms to accommodate parallel tracks when the conference splits into two or more strands. The conference venue should have a large open area where delegates can gather for refreshments during breaks and in which sponsors and other organizations can have exhibition tables, with monitors etc. as necessary, for delegates to visit and browse. It is likely that this area will also be used for registration.

The venue will need a place that lunch can be efficiently provided for delegates; in the past this has sometimes been a dedicated dining room, but the open area described above has also been used successfully. If the open area is to be used, a reasonable amount of seating will be appreciated if possible.

It is essential that the venue have good wifi. Poor wifi is probably the biggest single source of complaints at OR conferences over the years. Organizers and venue staff should not underestimate the demands that 400+ technology-oriented delegates can make on a system, and standard conference venue wifi, particularly in hotels, may not be sufficient for a tech heavy conference without adding supplemental bandwidth and access points. The wifi should support VPN and IRC connections. In the past some venues have been able to provide for presenters cabled network connections with priority access to the system or a separate wifi network not available to delegates thus ensuring they could reliably give demonstrations.

The location of the poster reception should be discussed. There are clear advantages to having the posters in the conference venue (where they can be browsed at times other than the reception) but some organisers have placed them elsewhere so that the reception can be in a different (and usually impressive) location.

Workshops

Generally workshops are held the day prior to the conference start and are a combination of half and full day workshops. Organizers will need to use their local knowledge to decide where, and how many of these workshops can be managed. The total number of delegates attending such workshops will be somewhat lower than that attending the conference proper, and it may not make financial sense to use the main conference venue for them. Whatever venues are made available should have good wifi, projection facilities, and be close to places where attendees can get lunch. Ideally they will be close together and close to the main conference venue.

And if your bid is accepted?

If your bid is successful it will be important that you gather together a Host Organising Committee as soon as possible. In particular, the OR SC will want to know the name of its Chair as soon as possible so that (s)he can immediately become party to the wider planning process.The expectation is that the Chair of the HOC will begin to regularly participate in calls in the first call immediately after the OR that will precede their conference (i.e. if you are hosting the 2020 OR, you will be asked to participate in the regular OR SC calls starting in July 2019). However, the Chairs of upcoming conferences are encouraged to join in the OR SC calls immediately if only to become familiar with the process of hosting. The Chair will also be added to the appropriate email lists, and given access to the wiki and social media sites for publicizing the conference.

The Annual Cycle

(Starting in July or August after the annual OR conference)

The following covers the main points in the annual cycle of preparatory events. Dates are approximate and may need to be varied depending on the actual timing of the coming OR event. The timings given here would be for a conference to be held in June or July. It has been the practice in recent years to build extension dates into the planning for proposals. Thus the CfP will call for submissions by a certain date but then, inevitably, a one or two week extension will be offered. Behind the scenes planning proceeds on the basis of this later date.

August

Appointment of Program Chairs - OR SC

During the summer preceding the conference, the OR SC will identify a Chair or Co-Chairs of the Program Committee. The Program Chairs are added to the Open Repositories Steering Committee for the duration of the relevant conference cycle. They are not permanent members of the Committee and have no voting rights. Following the event and the immediate post-conference work they are removed from the Committee lists. There is no OR policy on whether the Program Chair and Host Organising Committee Chair should come from different institutions.

September

Appointment of Program Committee and Track Chairs - Program Chair(s)

The Chair(s) will appoint additional members to the Program Committee and together the group is responsible for soliciting and selecting content for the year's OR event. Later in the year they will identify a team of reviewers to advise on the submissions that are made. Members of the program committee generally serve as Track Chairs. Tracks include Workshops, Posters, 24x7's, and the Ideas Challenge. These Track Chairs work with the wider program committee but also take responsibility for their particular content block. In addition, the Chair(s) for the Idea Challenge manage that event for the conference. Content that is proposed for one Track is often referred to and accepted in a different Track (i. e., a full paper proposal becomes a 24x7; a 24x7 might become a Poster) The Program Chairs, Track Chairs, and Program Committee will hold regular conference calls generally starting in the fall.

Set Theme for OR Conference - Program Chairs with approval from OR SC

Working with the OR SC and Chair(s) of the Host Organising Committee, the Program Chair(s) sets the theme for the conference.

Review Communication Processes - OR SC

The OR SC maintains a directory of listservs, groups, and social media venues to target. Each fall, the OR SC should review the directory for defunct lists/venues or potential new additions.

October

Conference website and social media - Host Organizing Committee

Ideally the conference website should be launched in October at the latest. Social media provision should be made at the same time (identification of Twitter tag etc). The website should clearly signpost the OR "Code of Conduct" (see Appendices). At OR13, the Code was reproduced in the Conference Handbook; from OR2014 it appeared on the conference website as well as in the conference handbook.

Develop Sponsorship Campaign - Host Organizing Committee

Create a sponsorship brochure (based on the template) and web pages. Identify potential sponsors based on existing lists and local opportunities. Note that local hosts have license to shape the benefits sponsors receive at various levels; however this should largely be consistent with past practice, and done with an eye that many sponsors return year over year, and the whole community benefits from some consistency on this front. It is OR policy that sponsors do not receive preferential slotting in the program.

Finalize Call for Proposals - Program Committee with approval from OR SC

Ideally the Call for Proposals is released in November though this date has shifted over the last two ORs (2017 and 2018). A large part of the Program Committee work at this part of the cycle is determining what they want the skeleton of the program to look like: will there be Rants in the 24x7 presentation? How will you integrate platform specific conversations? What space is available for posters and workshops? All of these discussions shape what the CfP might look like, and the categories for the submissions.

The CfP should contain:

- The dates and venue of the conference
- The theme of the conference
- An invitation to submit a proposal for the various tracks. It should be made very clear that proposals not accepted for one track may be pushed to another if appropriate.
- A clear indication of the form and quality of submission expected for each category (how many pages, etc). The Program Committee may feel it appropriate to offer optional templates for guidance in each of the categories.
- The CfP should mention the Idea Challenge but this will be the subject of its own call in due course.
- Closing date for proposals.
- The CfP should contain the name(s) of the Program Committee Chair(s) as signatories.
- The CfP should reference the Code of Conduct.
- The CfP should include information about the Scholarship Program (see below)

Past CfPs are available elsewhere on this wiki and recent ones should be consulted. Please note that it should be possible to provide the Program Committee with statistics from the previous year(s) and the number of submissions in each category (paper, poster, 24/7 etc) and the numbers ultimately accepted.

Finalize Dates for the CfP, Acceptance, and Registration - Program Committee and Host Organizing Committee with approval from OR SC

The Program Committee in collaboration with the Host Organizing Committee should finalize the dates for submissions deadlines, reviewing process, decisions, schedule, and registration. It is customary to build in extension times for submissions into the deadlines. Also, the Program Committee and Host Organizing Committee will need to work closely together around the deadline for workshops. We have found it is best practice to have workshops reviewed and selected earlier so that they can be listed when registration opens. This allows the HOC to be able to make determinations about rooms or limits to registration if needed. A sample timeline might look like:

- Nov 15 - Call for Proposals opens
- Jan 5 - Published deadline for submissions
- Jan 13 - Actual deadline for submissions
- Feb 1 - Deadline for review of workshops
- Feb 13 - Deadline for review of all other proposals
- Feb 15 - Registration opens with accepted workshops and keynotes announced
- Mar 1 - Decisions sent to submitters
- Mar 15 - Schedule Available
- June - Conference

Details of Scholarships - Scholarship Subcommittee

Prior to the release of the CfP the Scholarships Subcommittee should decide how many scholarships to the year's OR will be offered so that a call for applications can accompany it. An application form of some sort needs to be available. (For OR2014 this was a web form as part of the conference website. For OR2015 a Google form was trialled.) An appropriate page of information will be needed on the conference website. The deadline for applications should allow plenty of time for recipients to complete arrangements for additional funding, to get any necessary visas and to make travel arrangements.

Develop and Issue Call for Expressions of Interest (EoI) for future conference hosting - OR SC

The OR SC develops a Call for Expressions of Interest (EoI) for hosting the next conference yet to be selected (generally, OR Conferences are selected two years out). The EoI should include instructions and expectations for the Expression of Interest including a schedule for the next steps and a link to this document. This call should be distributed to appropriate communication channels. The OR SC should actively recruit potential hosts.

November

Call for Proposals Released - Program Committee with support from OR SC

The CfP should have a very broad distribution. The OR SC maintains a directory of listservs, groups, and social media venues to target. The directory is in the form of a table so that lists can be checked off as they are notified to prevent or minimise duplication. Effort should also be given to finding extra mailing lists that are relevant to any theme the conference might have; these should also be targeted. Encourage recipients to rebroadcast the call to lists that seem to have been neglected.

Keynote Speakers Identified - Program Committee in collaboration with Host Organizing Committee with approval from OR SC

In general, the earlier that keynote speakers (generally for both opening and closing) are identified and secured the better particularly if the Program Committee is looking at high profile speakers. The Program Committee should work closely with the Host Organizing Committee on confirming the budget available for bringing the speakers to OR and for providing a small honorarium; it is not uncommon for OR to bring in international speakers so the budget should be able to account for that.

Launch Sponsorship Campaign - Host Organizing Committee

Once the CfP is released, a sponsorship campaign can also be launched (having the theme set within the CfP can make approaching potential sponsors easier). The Host Organizing Committee should consider previous sponsors as well as local contacts including local or regional universities and business.

December

Identify and Invite Reviewers - Program Committee

Reviewers should be identified and invited for the incoming proposals. The Program and Track Chairs should be able to call on the previous year's list as a starting point, and all members of the Steering Committee should be invited to contribute. In recent years, each proposal in the general paper track has been allocated three reviewers and each reviewer has been allocated four to six reviews. This has been the subject of discussion as some reviewers felt that they did not get an adequate "feel" for the relative quality of submissions. Reviewers can be loaded into ConfTool and managed there.

Open ConfTool for Submissions - Host Organizing Committee

Ideally ConfTool (or whatever conference submission system is in use) will be open and ready when the CfP is released, but it is common to have it open a bit after the CfP.

Review submitted EoI's - OR SC

The OR SC should review the submitted EoI's in order to select candidates to invite to do a full bid. The criteria for selection may vary from year to year primarily because of geographic considerations. This can be done through a discussion on the monthly call or through an online vote. Successful EoI's should be given at least six weeks to prepare a full bid.

January

Submission Closes and Reviews Begin - Program Committee

Once submissions close (usually with a week long extension from the original date), the program and track chairs should assign reviewers to each submission. Program chairs may decide what level of review different tracks get; for example, submissions to the general track may get three reviews but posters only two. This is up to the Program Committee. Make clear to reviewers what the deadline for reviews will be. In general, reviewers have been given about a month.

Workshops will need to have a faster track since it is important these are included in the registration process.

Venue Selected for Conference Events - Host Organizing Committee

Because the costs for the conference dinner and other venues for social events often figure substantially into the registration costs, these should be selected and budgeted for well prior to the opening of registration. We recommend that the HOC use https://www.diglib.org/dlf-events/dlf-social-event-checklist/ as a set of guidelines for social events; in particular pay close attention to accessibility, a range of food options, and availability of non-alcoholic drinks at all events.

February

Select Workshops - Program Committee with Host Organizing Committee

Because there are often a limited number of rooms for workshops and a limited number of slots available, it is useful to include a workshop selection step in the registration process. This means that workshops have to be reviewed and selected earlier than the remainder of the papers. Arrange with successful workshop organisers to get appropriate details for the descriptive page if that was not included in the submission.

Selected workshops should then be passed on to the Host Organizing Committee to include in the registration process.

Registration opens - Host Organizing Committee

Once workshops have been selected, the Host Organizing Committee should open registration. It will be important to have other logistics such as hotel blocks and travel recommendations set up prior to opening registration since many people may make all of these arrangements at the same time.

In the past, two registration fees have generally been offered - an "early bird" fee, with an associated deadline, and a higher fee for later bookings. It is up to the Host Organizing Committee how they might want to manage the registration fees, including early bird or student fees. In addition, some Hosts have separated the cost of the conference dinner from the registration fee in order to better understand how many people will attend the dinner. There are pros and cons to having a separate cost for the dinner, and the Host Organizing Committee is welcome to speak to the OR SC about this and how this has been managed in the past.

The website booking process must use https.

The registration form should have a checkbox "I agree to be contacted about future OR conferences". Names and email addresses of registrants who mark "yes" will be forwarded to the OR SC after the conference to be added to the open-repositories Google group.

March

Develop Rough Schedule for Program - Program Committee and Host Organizing Committee

It is useful to rough out a program schedule while reviews are being completed so that the Program Committee has a clear sense of how many submissions can be accepted in each track. This will require working with the Host Organizing Committee to understand number of simultaneous tracks that are possible, space for the poster session, etc. Also, the Program Chairs should understand how much time will need to be blocked out for the opening session and keynote, the Ideas Challenge, and the closing session and keynote (the three standard plenary sessions for OR).

Reviews complete, submissions selected, and notifications issued - Program Committee

Once reviews are complete, the Program Committee works to identify which submissions should be accepted into the program, which submissions might be designated to a different track from the original submission (for example, a paper might be accepted as a poster), and which should be rejected. Often the Track Chairs can make the acceptance decisions within their tracks and will bring edge cases to the broader Program Committee. The Program Chairs have final authority over acceptances and rejections. Once these are finalized, notifications should be sent using ConfTool. The Program Committee should allow time to hear back from submitters whose submissions were designated to a different track whether they accept the track change.

Program Schedule Complete - Program Committee

Now that the decisions about content have been made, attention should be turned to fleshing out the detail of the program schedule. This should be posted on the website as soon as practical.. Early information about the conference structure and content may be essential to potential attendees seeking funding from their institution. A six week lead time or better is desirable.

Once the timetable is published, an email should be sent to the lists advertising the fact and encouraging people to register. If not already done, now is a good time to identify and recruit session chairs for the conference.

Arrangements Made for Scholarship Awardees - Host Organizing Committee and Scholarship Subcommittee

Once registration opens and scholarship recipients have been selected, arrangements should be made for the free registrations, and, for the fellowship awardee, travel arrangements. This is particularly critical if the awardees have to apply for visas to attend the conference.

Selection of Full Bid for Conference Hosting - OR SC

Once all bids have been submitted the OR SC should review each bid carefully for the criteria required (see above) with close attention to the budget, logistics, and experience. In areas that need further clarification, the OR SC should seek clarity from the bidder. Once the OR SC has satisfied their questions on the bids, they should vote on which bid should be awarded the conference. The successful and unsuccessful bids should be notified. The successful bid should be given time to prepare a "Save this Date" website before a public announcement is made. However, it is critical to make the Save the Date announcement as soon as possible ideally in time for this year's conference so that those dates are on people's calendars, and other conferences are planned around them. All bids should be saved in the knowledgebase.

April

Prepping of Keynote Speakers - Program Committee

It is important that the Program Chairs schedule a call with the keynote speakers (either separately or together) to check in about logistics, needs for their presentations, and to spend a little time orienting them to the Open Repositories community and its general ethos. This is to ensure that the keynote speakers pitch their talks to the right audience.

Management and Planning of the Ideas Challenge - Program Committee

Much of the work around the Ideas Challenge happens at the conference. However, planning should start early. Considerations include whether there is a theme for the Challenge or if sponsorship is sought for the reception (if any) or for prizes. The success of the Ideas Challenge is often dependent on an enthusiastic and appealing campaign just prior to and during the conference; it is important to gather a group who can carry that campaign forward.

May

Planning for Opening and Closing Sessions - Program Committee, Host Organizing Committee, and OR SC Chair

The opening session generally contain quite a few segments including (but not limited to and not in any particular order):

- a welcome from the OR SC Chair, the Host, and the Program Chairs;
- a welcome from someone such as a Provost or University Librarian at the Host Institution,
- a review of the Code of Conduct;
- an introduction of the Program Committee, Host Organizing Committee, and the Steering Committee;
- an overview of the number of submissions to the program and acceptances;
- An overview of the demographics of the registrants;
- Thanks to sponsors;
- Substantial changes to the program (for example, new tracks or changes to tracks);
- Ideas Challenge;
- Introduction of the keynote speaker; and
- The keynote itself and questions.

This needs to be well planned in order to not go over the time allotted to the session and allow sufficient time for the keynote speaker.

The closing session also contains a number of segments including (but not limited to and not in any particular order):

- The introduction of the keynote speaker;
- The keynote itself and questions;
- Award of prizes for the best poster (if offered);
- Award of prizes for the Ideas Challenge;
- Thanks to sponsors;
- Introduction of the next OR location (usually done by the Host Organizing Committee of the next year's conference);
- Closing comments from the various chairs; and
- Thanks to key parties.

Similarly this session will need to be well timed so that the conference ends on time.

Preparation for Conference - Host Organizing Committee and Program Committee

The HOC should prepare the program for printing and for online. Please note that there was a mixed reaction to an online only program used in a recent OR. Prepare inclusion of sponsorship materials in conference packs, etc. if necessary. An app like Sched can be a useful way to provide an online and social experience for the conference.

It is important that provision be made for collecting conference presentations in a digital form to add to the conference web site (and eventually, a repository of all OR presentations). In the past, session Chairs have sometimes been asked to collect these from their group. However it is done, an effort should be made to get as many as possible: they form a valuable resource.

The Host Organizing Committee should be ensuring that all speakers are registered so that any potential gaps in the program are identified very early on.

Typically there can be a lot of sponsor management during this period particularly if there will be exhibit spaces for sponsors.

Members of the Host Organizing Committee, Program Committee, OR SC, and those who will be staffing the conference should be familiar with the Code of Conduct, Anti-Harassment Policy, and the protocol for managing reports of violations.

June

Hold Conference - Program Committee, Host Organizing Committee, and OR SC

All groups should be prepared for last minute hiccups during the conference and have clear communication channels for these/ Slack is often used to communicate during the conference for this purpose.

Debrief Meeting - Program Committee, Host Organizing Committee, and OR SC

Generally the lunch immediately following the closing keynote is dedicated to a debrief amongst all of the organizers on lessons learned. This also includes the chair(s) of the following year's host organizing committee. A conference call with a de-brief as the main agenda topic should be arranged with organizers soon after the conference ends if a face-to-face meeting cannot be scheduled.

Delegate Survey - Host Organizing Committee with input from the OR SC

The HOC should distribute a survey electronically to all delegates at conference close. The questions should be based on previous years' surveys (for trending) as well as feature any new questions relevant to that event. The returns from the delegate survey should be collated and sent to the OR SC within a month of the conference close so that the information derived from the returns can be used to influence the way that the next conference is organised. The OR SC can provide the previous year's survey.

July

Website Wrap-Up - Host Organizing Committee

Rather than let the conference website go moribund, it is appreciated if it can be updated post-conference to reflect some of the highlights and trivia from the event and to add presentations (or links to presentations in a repository) from the program.

Also, past conference website have been archived in the Internet Archive; once the website is finalized (including with links to presentations), work with the OR SC to get this added via an Archive It account or the IA's general crawl.

Content - Host Organizing Committee and Program Committee

Presenters should have provided session Chairs (or otherwise supplied) an electronic version of their presentation. These need to be collated and stored safely. Some organisers have retrospectively linked them from the website's conference programme. At the time of writing, the Steering Committee is looking for a way to host these materials centrally year-on-year.

Social Media Accounts - Host Organizing Committee with ORSC

At the end of the conference, social media accounts (Twitter and Facebook) should be passed off to the next Host Organizing Committee.

Accounting - Host Organizing Committee with OR Finance Subcommittee and CLIR

In due course, the OR SC will expect a set of summary accounting reports for the conference, preferably under the same headings as were used in the initial bid. This will allow easy comparison of the two. The total sponsorship income should be specifically shown in the final accounts. If, as is usual, the conference made a small profit when everything is taken into account, the organizers will need to agree with OR SC how and when to transfer the surplus into the OR contingency fund.

Knowledge base - Host Organizing Committee and Program Committee

As soon as practical following the conference, the knowledge base in the wiki needs updating with the conference documents for the information of subsequent organizers and potential organizers. In practice, many of these documents may have been added "along the way" but now will be a good time to check that everything is there. If Google docs or other tools were used outside the wiki, download and transfer the required information to the wiki; if there is additional information that may be useful, add those as well. Documents to be included in the knowledge base can be found in Appendix D.

Review Steering Committee Membership - OR Steering Committee

In the month after the conference, the permanent members of the SC should review the membership. Membership is generally kept at 14-16 permanent members with an addition of the Program and Host Committee Chairs rotating on and off each year. The current membership policy can be found at: https://wiki.duraspace.org/display/or11/Membership+Policy+2015.

Appendix A: Open Repositories Code of Conduct

Please see Open Repositories Code of Conduct.

Appendix B: Open Repositories Anti-Harassment Policy

Please see Open Repositories Anti-Harassment Policy.

Appendix C: Open Repositories Anti-Harassment Protocol

Please see Open Repositories Anti-Harassment Protocol.

Appendix D: What to include in the knowledgebase for each conference

Each conference will have different methods for managing documents and data related to a conference. They may use a combination of Google Drive, ConfTool, and other collaboration tools. The OR SC does not dictate what tools are used in the process of managing a conference; however, the OR SC does request that certain data and documents are preserved in the Duraspace hosted wiki so that future organizers can refer to these.

The conference website should be submitted to the Internet Archive for web archiving.

The data to be captured includes:

- Number of submissions total and broken down by track
- Number of acceptances total and broken down by track
- Number of registrations
- Timeline of registrations (if possible); breakdown of early vs late registrations
- Number of attendees broken down by country
- Number of attendees from US broken down by state
- Number of attendees for the workshops
- Number of reviewers we ask to review / number who actually review
- Number of scholarships and fellowships given by country; names of recipients
- Number of submissions to idea challenge
- Twitter feed

The documents to be captured are:

- Copy of the successful bid;
- Copies of both the proposed budget (from the bid) and the actual post-conference record of expenditure;
- Overall schedule including when the CfP was released, extension dates, closing date, review period, registration opening, registration deadlines, program announced, conference dates;
- Call for proposals;
- Communications related to the registration opening, program announcements, etc.;
- List of proposed keynote speakers and invited keynote speakers;
- Conftool (or other system) email templates;
- Venue information including number and size of rooms and any issues with rooms;
- Number of code of conduct violations and type of issue (no personal information);
- Copy of the full program and schedule;
- Sponsorship prospectus;
- Overview of potential sponsors contacted including successful and negative responses. Ideally the levels of sponsorship selected and amounts received will be shown;
- Report of results from the conference assessment survey; and
- Lessons learned for both the host and program committees.

In addition, the website should be submitted to the Wayback Machine.

Appendix E: Data Policies and Guidelines

To be added

Appendix F: Statement on Inclusion and Openness

Please see OR Statement on Inclusion and Openness