Open Repositories Conference Handbook

- Introduction
- The Open Repositories Vision
- Open Repositories Organization
    - Responsibilities of the Steering, Program, and Host Committees
    - Conference specific responsibilities of the Steering, Host, and Program Committees
- Open Repositories Resources
- Open Repositories: Past, Present, and Future
- Preparing a Bid
    - Fiscal Responsibility
    - General expectations
    - Expression of Interest
    - Preparing a Detailed Bid
    - And if your bid is accepted?
- The Annual Cycle
- Appendix A: Open Repositories Code of Conduct
- Appendix B: Open Repositories Anti-Harassment Policy
- Appendix C: Open Repositories Anti-Harassment Protocol
- Appendix D: Visual of Annual Cycle
- Appendix E: What to include in the knowledge-base for each conference
- Appendix F: Data Policies and Guidelines
- Appendix G: Statement on Inclusion and Openness
- Appendix H: Guidance for Session Chairs

This handbook was last revised in April 2022.

Introduction

This document is intended to serve both as an aide-memoire for the Open Repositories organization and as a guide for each year's conference organizers. We attempt to keep this as up to date as possible, but there may be areas which are inaccurate. If you have questions, please contact the Chair of the Open Repositories Steering Committee.

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 (OR) Conference occupies a unique place in the landscape of open knowledge, open source and digital preservation conferences. Acknowledging the vital role open repositories play in preserving and creating access to scholarly outputs, the conference's 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 digital resources.

Open Repositories Organization

The **Open Repositories Steering Committee (ORSC)** is the organizing group whose members have deep knowledge of the open repository space. The ORSC has the overarching responsibility to ensure the continuation of the conference from year to year and to guide the direction of the conference.

In practice, this means that the ORSC identifies future conference sites and host organizations, selects a program committee in a process that is independent from that of selecting a conference site, helps to reach out to potential sponsoring organizations, manages fellowships, 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 primarily for fellowships). In the event of something that might prevent a conference from happening (as happened with the COVID-19 pandemic), the ORSC makes decisions such as canceling a conference or shifting to virtual only.

The ORSC meets monthly (via video conference call) or more often as needed. The ORSC is made up of 12-13 standing members as well as the Program and Host Chairs for the current year and the upcoming year as they are selected. Program and Host chairs rotate off of the ORSC when their responsibilities are complete. There may be some items which only the standing members may act on such as the decision on a bid to host or voting on new standing members. The ORSC elects a Chair and Vice-Chair for terms of two years. 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 conference and is responsible for managing the conference logistics (whether the conference is physical or virtual) including the venue, accommodations, receptions and dinners, sponsorships, and the budget. For a virtual conference, the responsibilities may include recommendations on online platforms and tools, hosting online sessions, scheduling and running test sessions with speakers, and social media monitoring and management. Generally the chairs of the OR HOC are named when the bid for hosting is put forward; the chairs are then responsible for naming the remainder of the committee. It is recommended to have at least two OR HOC chairs. The OR HOC Chairs (selected by the Host organization) attend the monthly ORSC meetings, and work closely with the ORSC and the OR Program Committee Chairs. If a conference shifts from physical to virtual (as happened with COVID-19), the original OR HOC may shift substantially in membership as the needs of a virtual conference can be very different than that of a physical conference.

The **Open Repositories Program Committee (OR PC)** changes with each conference (whether physical or virtual) 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 (CfP), identifying and inviting keynote speakers, managing the peer review process, selecting proposals for presentation, and establishing the program schedule. There are at least two, usually three, chairs selected by the ORSC; the Chairs then select members of the wider OR PC. The OR PC chairs attend the monthly ORSC meetings, and work closely with the ORSC and the OR HOC Chairs.

Specific responsibilities of each group are outlined below.

Responsibilities of the Steering, Program, and Host Committees

Open Repositories Steering Committee (ORSC) responsibilities

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

Non-conference specific responsibilities:

- Setting of policies and guiding documents that apply across OR conferences such as the Code of Conduct.
- Oversight and management of the OR Code of Conduct and Anti-Harassment Policy.
- Conducting monthly meetings via conference calls.
- Oversight of reserve funds.
- Management of the OR website (provided by the Council on Library and Information Resources (CLIR) and wiki (provided by LYRASIS).
- Identification and maintenance of links with allied / affiliated groups for cross-promotional marketing, program activities, etc. (e.g., SPARC, COAR, CNI, IASSIST).
- Election of new ORSC members according to the membership policy.
- Election of ORSC Chair, Vice-Chair, and other officers (if any).
- Maintenance of Conference Handbook and the ORSC wiki.
- Management of membership and charge of standing subcommittees including the Finance, Fellowship, and Code of Conduct subcommittees.

Conference-specific responsibilities:

- Recruitment and selection of host organizations and institutions via the Expression of Interest (EoI) and bidding process.
- Decision to cancel a conference.
- Decision to transition a physical conference to a virtual conference.
- Recruitment and selection of OR PC Chairs.
- Approval of the theme, CfP, and overall structure of the conference as put forward by the OR PC Chairs.
- Approving meeting timeline for conference activities. (See the Annual Cycle).
- Subscription to submissions website (ConfTool) and management of personal data within.
- Oversight of fellowships selection and awards. Coordinate with the OR HOC for travel arrangements for the full fellowship.
- Support for solicitations for fund-raising / sponsorship to previous & new donors in conjunction with the OR HOC.
- Communication about the conference, including the CfP, EoI, registration calls, etc.

Open Repositories Host Organization Committee (OR HOC) and Chairs responsibilities

The OR HOC and chairs are generally selected by the hosting institutions. If there is a transition from a physical to a virtual conference, the hosting of the conference may shift to a subgroup of the ORSC in conjunction with a program committee in recognition of obligations an OR HOC may have to a future physical conference.

- 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. Note that a WordPress site for the conference website will be provided to the OR HOC.
- Use of the OR Twitter account to communicate about the conference (see https://twitter.com/openrepos) and to respond to questions and issues.
- Use of the OR Facebook account to communicate about the conference and respond to questions and issues.
- Provision of visa letters to attendees as needed (depending on location, this can be an intensive process).
- Arrangement of travel for fellowship recipients. The ORSC maintains funds that can be used for this purpose; however, we cannot easily make the travel arrangements and prefer the OR HOC to do so. We can reimburse the Host Organization, or the costs can be taken out of the surplus.
- Arrangement of travel and payment of honorarium (generally a minimum of $1000 USD) for the keynote speakers.
- Management of relationship with conference organizers (if used), venue staff, and others key to the logistics of the conference.
- Work closely with the Program Chairs and Committee on a 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, including virtual conference services (if done in conjunction with the physical conference).
- Development of a sponsorship prospectus.
- Identification and engagement of sponsors in financial support of the conference in collaboration with the ORSC as needed.
- Planning and coordination of meal services throughout the conference. We expect that meals and drinks will meet a wide range of dietary needs and that beverages will include non-alcoholic options. We suggest that the OR HOC collect dietary needs of participants at registration.
- Protocol for managing Code of Conduct violations in collaboration with the ORSC and Code of Conduct sub-committee.
- 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 ORSC at the end of the conference.
- Post-conference feedback to the ORSC and Conference Knowledge-base (attendance statistics, financial report)
- Feedback to ORSC for improving and evolving the Conference Handbook.
- Return of any surplus to OR reserve fund as soon as feasible after the conference.

Open Repositories Program Committee (OR PC) and Chairs responsibilities

The OR PC Chairs are appointed by the ORSC. The Chairs populate the OR PC with members. Some members may be responsible for a specific track (posters, 24x7, developers, etc.). The Chairs and the OR PC have ultimate responsibility for determining the program for OR.

Note: If a conference is forced to transition from a physical conference to a virtual one, the OR PC generally remains in place and is responsible for establishing the program in the virtual space. Many of the responsibilities outlined below remain the same.

- Identify theme(s) of conference with approval by the ORSC.
- In coordination with the ORSC and the OR HOC, determine whether there will be a virtual component of the conference. (This is ultimately the decision of the ORSC.)
- Work closely with the OR HOC to ensure information is posted on the conference website.
- Work closely with the ORSC to ensure that the submission system (generally ConfTool) is set up and open when the CfP is released.
- With approval from ORSC and support from the OR HOC, set timeline for submission, review and notifications
- With support from the ORSC and the OR HOC, identify Track Chairs (e.g., Workshops, Developer track, Ideas Challenge, Posters, 24x7, etc.).
- Establish guidelines and expectations for each category of submission.
- Produce and publish the CfP with approval by the ORSC.
- Participate in management of social media (Twitter and Facebook) and communications about the conference alongside the OR HOC and ORSC.
- With the OR HOC establish expectations for posters (electronic only? If printed, what size?). There may be constraints on numbers given the size of venue.
- With support from the ORSC, recruit appropriate reviewers.
- Management of review and selection process for all content for the conference.
- With the OR HOC determine the number of acceptances possible given rooms and slots 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).
- Communicate workshop venue, participants limits, fees, timing to the OR HOC so that they can clearly post that information on the conference website.
- Set schedule for the conference and session themes.
- With approval from the ORSC, identify, communicate with, and manage the keynote speakers. Arrange with the OR HOC the travel and honorarium.
- Management of the website for submission, review, and acceptance procedure (in coordination with OR HOC).
- With the ORSC Chair and Vice-Chair and Chairs of the OR HOC, plan the opening and closing plenary sessions. Provide a slot at the end of the conference for next year's OR HOC representative.
- Feedback to ORSC for improving the Conference Handbook.

Conference specific responsibilities of the Steering, Host, and Program Committees

This table outlines which group has a primary, secondary, consultative, or approval role for various responsibilities in the management of a conference.

(Please note that the Host and Program Committee chairs sit on the Steering Committee and participate in much of the decision making there.)

	Steering Committee	**Host Committee Chairs /Committee**	**Program Committee Chairs /Committee**
Recruitment and selection of host organizations and site of conference*	Primary	N/A	N/A
Decisions to cancel or transition physical conference to virtual	Primary	Secondary	Consultative
Recruitment and selection of Program Committee Chairs	Primary	Consultative	N/A
Selection of Program Committee members/Track Chairs	Consultative	Consultative	Primary
Selection of conference venue and accommodations	Consultative	Primary	N/A
Establishment and management of budget for conference	Consultative	Primary	N/A
Recruitment and management of sponsors for conference	Secondary	Primary	N/A
Conference theme, call for proposals, and timeline for submissions and acceptances	Approval	Consultative	Primary
Conference structure	Consultative	Secondary	Primary
Recruitment and management of reviewers for conference	Consultative	N/A	Primary
Selection and management of keynote speakers	Approval	Secondary	Primary
Payment of honoraria to keynote speakers	Approval	Primary	Consultative
Management and execution of review and acceptance process for conference	N/A	N/A	Primary
Communication with proposers on status of submissions and, if accepted, on logistics of presenting	N/A	N/A	Primary
Planning of opening and closing plenary sessions	Secondary	Secondary	Primary

Management of conference registration and fee collection	N/A	Primary	Consultative (for example, if workshops need to be included in the conference registration)
Maintenance of conference website (hosted by CLIR) and mobile app or interface including conference schedule, logistics, and other relevant information.	Consultative	Primary	Secondary
Management of submissions website (ConfTool)	Consultative (ORSC manages subscription and management of personal data)	N/A	Primary
Social media communication and monitoring	Consultative	Primary	Secondary
Provision of visa letters to attendees as needed	N/A	Primary	N/A
Selection and management of fellowships	Primary	N/A	N/A
Arrangement of travel for keynote speakers and fellows	Consultative	Primary	Consultative
Coordination of A/V needs for presentations, event recording, live streaming, etc.	N/A	Primary	Consultative
Reviewing and updating Code of Conduct and associated protocols	Primary	Consultative	Consultative
Implementation of protocols for managing Code of Conduct violations	Secondary	Primary	Consultative
Planning and coordination of meals and conference events	Consultative	Primary	N/A
Management of logistics during the conference itself	Consultative	Primary	Consultative
Assessment of conference including participant survey and post-conference review	Primary	Primary	Primary
Return of any surplus funds to the OR reserve funds	Primary	Primary	N/A

Open Repositories Resources

Wiki and Website

The ORSC maintains a website at http://openrepositories.org/. This website is public facing and contains a current list of ORSC members as well as announcements relevant to OR conferences. The ORSC may also use this to publish policies or statements that they want to make public. This website and domain is supported by CLIR; we pay a nominal amount for technical hosting.

In addition, since 2021, CLIR has provided the conference website (such as https://or2021.openrepositories.org/) using WordPress as the content management system; the OR HOC is given access to this website to manage and maintain.

The ORSC also maintains a wiki, hosted by LYRASIS (for free at this time), at https://wiki.lyrasis.org/display/or11/OR+Steering+Committee+Home. The wiki has some public information, but in the main is used by the ORSC and associated Program and Host Chairs as a knowledge-base for tracking ORSC meeting minutes, internal conference planning, distribution lists, etc. In the past few years, the ORSC has made heavy use of Google Drive for active collaboration on documents related to the conference. We are still in the process of determining how best to manage this content, but in general, while conference planning may take place on 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 ORSC 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. The ORSC is responsible for the initial set of ConfTool and transfer of data; the OR PC then is given control of the site. The Program Chairs should be prepared to dedicate some time to familiarizing themselves with ConfTool and its functions. The OR HOC may choose to license a tool such as Sched in order to provide an online and mobile program for attendees.

Communication Channels

The ORSC maintains a listserv that is used for regular communication amidst ORSC members (listserv hosting is managed by CLIR). The ORSC also uses a Slack channel for communications.

For communication with the OR community we have a Google Group and a spreadsheet of mailing lists to share announcements with as well as social media channels.

Social Media

As of August 2018, there is one Twitter account (https://twitter.com/OpenRepos) that is passed from each OR HOC and OR PC to the next, and can also be used by the ORSC to communicate as needed. The ORSC also maintains a Facebook site (https://www.facebook.com/ORConference/) that is also used by the OR HOC and OR PC.

OR Repositories

The ORSC maintains a repository in Zenodo at: https://zenodo.org/communities/openrepos. In addition, there is a YouTube channel where recordings from the conference are kept.

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 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 fellowships to assist the attendance of individuals (usually from the developing world) who 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 prizes or gifts as part of the conference proceedings; and/or
- assistance in the case of extraordinary circumstances.

Whilst it is the host institution's responsibility to make appropriate insurance arrangements, the ORSC would be willing to consider requests for additional assistance from this fund in the event that, for example, closure of national airspace or a pandemic resulted in the conference having to be canceled.

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 an 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 - is an opportunity for conference-goers 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.

In 2020, the global COVID-19 pandemic resulted in the planned conference in Stellenbosch, South Africa, being transformed into a fully online virtual conference. A variety of workshops, panels and presentations were delivered online via video conferencing and webinar platforms. Posters were published as pdf or short slide decks on a webpage which allowed viewers to leave comments and questions, as well as being presented in a scheduled poster session. The 2021 conference was also conducted as a fully virtual conference, with parallel sessions bridging over global time-zones. It added a virtual social platform for networking, sponsor presentations and informal discussion.

Past Conferences

Sydney, Australia, 2006

- Conference web site: https://web.archive.org/web/20180715000000*/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: https://web.archive.org/web/20120615000000*/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: https://web.archive.org/web/20120615000000*/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: https://web.archive.org/web/20170501000000*/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/

- Program Chairs: Claire Knowles; Evviva Weinraub
- Attendance: 350ish
- Number of presentations: 48 in general track (as of 2018 interest groups were embedded in the general track); 11 developer track; 34 24/7; 39 posters; 13 workshops

Hamburg, 2019

- Conference web site: https://web.archive.org/web/*/https://or2019.blogs.uni-hamburg.de/
- Twitter feed: https://twitter.com/or2019 or https://twitter.com/OpenRepos
- Program Chairs: Jyrki Ilva, Jessica Lindholm, Torsten Reimer
- Attendance: around 560
- Number of presentations: 83 in general track; 14 developer track; 40 24/7; 53 posters; 20 workshops

Online, 2020 (Stellenbosch was postponed because of COVID-19)

- Conference website: https://web.archive.org/web/20220901000000*/https://or2020.sun.ac.za/conference-programme/
- Conference theme: *Open for All*
- Twitter feed: @OpenRepo2020 #openrepos2020
- Program Chairs: Iryna Kuchma, EIFL, Leila Sterman, Montana State University, Lazarus Matizirofa, University of Pretoria, Dr Daisy Selematsela, University of South Africa
- Attendance: 976
- Number of presentations: 3 workshops, 16 presentations, 2 panels (13 presentations), 4 developer track presentations, 21 virtual posters and a virtual poster session, a year long Idea Challenge

Online, 2021 (Because of COVID-19)

- Conference website: https://or2021.openrepositories.org/
- Livestream: https://www.youtube.com/channel/UCh4SPzHAl-N1dqPPlmHgEzw/playlists
- Conference theme: *Open for All*
- Twitter feed: https://twitter.com/OpenRepos #OpenRepos2021
- Program Chairs: Liz Krznarich, DataCite, Iryna Kuchma, EIFL, Leila Sterman, Montana State University
- Attendance: 432 (Workshops), 429 (Tues), 62-284 (Wed), 411 (Thurs)
- Number of presentations: 8 workshops, 3 keynotes, 35 presentations, 5 panels, 28 24x7's, 9 developer track presentations, 36 virtual posters and a virtual poster session, a year long Idea Challenge

(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

Fiscal Responsibility

It is not the intention that hosting OR should be a financial burden on the organizing institution. Theirs should be a contribution in kind - providing staff time, and associated facilities, to organize and manage the event; the conference fees and sponsorship income should cover all other expenditures. That said, the ORSC 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**. Please note that it is part of the host's agreement with the ORSC that any such surplus 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 subsidize an unprofitable conference unless extraordinary circumstances can be cited. If providing the surplus back to OR is not possible due to organizational circumstances, we request that we are notified of that in the bid.

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

General expectations

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

1. **Accommodations:** Providing access and information for a range of types of accommodations is expected. Depending on 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 (though hosts should be careful about committing to large room blocks given the prevalence of AirBnB and other similar alternatives). 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. Organizers should try to ensure that negotiated hotel rates extend from the Saturday before the conference to the Saturday after inclusive due to the number of international attendees and follow-on meetings.

2. **Meals:** 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. We expect meals and snacks to meet a range of dietary needs (vegetarian, vegan, and gluten-free) and that there will be non-alcoholic options at receptions. See https://www.diglib.org/dlf-events/dlf-social-event-checklist/ for an excellent checklist.

3. **Accessibility:** The venue should be accessible. Providing information about accessibility of the venue is expected. Please see https://www.sigaccess.org/welcome-to-sigaccess/resources/accessible-conference-guide/ for a useful guide on preparing for an accessible conference.

4. **Internet access and technology:** 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 work responsibilities during the conference, and live demonstrations remain an integral part of conference proceedings.

5. **Recording and live streaming:** 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.

6. **Local transportation:** 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.

7. **Code of Conduct:** The host should expect to work 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.

8. **Conference dinner/event:** Planning a special event - generally a conference dinner - 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; again see the Digital Library Federation's Social Event Checklist for a good guide to ensuring events are welcoming to everyone.

9. **Sponsorship:** The ORSC does expect that the Host will solicit sponsors to help underwrite the cost of the conference.

Expression of Interest

The current pattern is that the ORSC will publish a request for expressions of interest (EoI) 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), and must include:

1. the name of the institution (or institutions in the case of a joint bid)
2. an email address as a first point of contact
3. the proposed location for the conference venue with a brief paragraph describing the local amenities that would be available to attendees, including its proximity to a reasonably well-served airport.

We have provided a template here for the EoI: OpenRepositories Bid EoI template (word document).

After the closing date the ORSC 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:

- Location and Proposed Venue:

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 attendees come. However, in 2017 OR was held in Brisbane, Australia, and in 2023 it is planned to hold OR in Stellenbosch, South Africa. The ORSC 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 G).

- Travel Logistics and Amenities

The ORSC 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 attendees in the area of the conference venue. The EoI should contain a brief paragraph outlining the benefits of the proposed venue in these terms.

- Host Organization’s Experience

The ORSC 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 organizing similar large conferences and events.

- Likely Cost to Attendees

For many OR attendees the cost of attending a conference is significant - especially where transcontinental air travel is involved. The ORSC 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).

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 information about previous years conferences. This handbook is also meant to be a resource to help ensure the bid meets the expectations of the ORSC. The ORSC 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.

Elements of the Bid

The ORSC has provided a OpenRepositories Detailed Bid template that can be used to provide the expected information in a bid. The bid should not exceed 15 pages. Any further details can be provided in appendices if necessary. The following are not intended to be complete or exclusive lists.

Narrative Elements

- **Dates**

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 attendees (remembering that attendees come from a number of countries) and ideally do not include national holidays for any of the major countries represented by attendees.

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. We no longer have a separate day for interest groups; these are instead integrated into the conference.

- **Expected number of attendees**

Using previous OR conferences as a guide, estimate your target number of attendees.

- **The conference venue**

The conference venue should have a single meeting space comfortably big enough to accommodate all the attendees during plenary sessions. It should have further rooms to accommodate parallel tracks when the conference splits into two or more strands (Hamburg in 2019 had five parallel sessions; generally we are seeing about three to four). The conference venue should have a large open area where attendees can gather for refreshments during breaks and in which sponsors and other organizations can have exhibition tables, with monitors etc. as necessary, for attendees to visit and browse. It is likely that this area will also be used for registration.

The venue will need a place where lunch (and potentially breakfast) can be efficiently provided for attendees; 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 is needed. Be aware that the lunch slot in the conference schedule is sometimes only an hour and so needs to be as efficient as possible.

It is essential that the venue has 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 attendees 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 attendees thus ensuring they could reliably give demonstrations.

The conference venue should be accessible. See https://www.sigaccess.org/welcome-to-sigaccess/resources/accessible-conference-guide/ for more information on providing an accessible venue.

The location of the poster display and 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 organizers have placed them elsewhere so that the reception can be in a different location.

- **Workshop venue and management**

Generally workshops are held the day prior to the conference start and are a combination of half and full day workshops. We have had as many as five to six parallel sessions of 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 attendees 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 or be catered. Ideally they will be close together and close to the main conference venue (or within easy public transit reach).

- **Accommodations**

Accommodations recommended to attendees should be reasonably priced and be within comfortable walking distance of the conference venue. As they are attending a technology conference, attendees will expect that all rooms will have free internet. If a room block is expected to be required as part of the venue negotiations, please mention here; we strongly recommend that any room block is required that it be as small as possible.

- **Social Events**

Provide potential venues for the conference dinner and poster reception (if not held at conference venue).

- **Larger environment**

Describe the area where the conference will be held. Why would this location be appealing for people around the world to travel to? You may include as an appendix an official brochure.

- **Host Organization experience**

Please include information about the host organization’s experience with hosting previous conferences. Also include who is likely to be chairing the OR HOC and who might be members.

- **Communication and marketing**

The ORSC will provide a website, Twitter account, and Facebook account, but the OR HOC has primary responsibility for managing these during the lead up and during the conference. In addition, the Host will be expected to contract for and manage the registration site (such as EventBrite) and mobile schedule (such as Sched). Please describe your experience managing both websites and social media accounts.

- **Sponsorship**

Please describe your experience with and approach to securing sponsors for conferences or other events.

- **Miscellaneous Items**

ORSC relies on Host Organizations to be able to do some things that come with holding an international conference. For example, we sometimes will need a Host to provide visa letters to attendees or to arrange travel for fellowship recipients (this cost would be either reimbursed by the ORSC or taken out of the conference surplus).

- **Contingency Plans**

Please describe your ability to manage contingencies if the environment rapidly changes (for example, switching to an online conference or moving the conference forward a year if necessary). If your organization would require event insurance, please describe that here.

Financial Elements

The ORSC anticipates that the financial element of a bid will be supplied as an Excel spreadsheet or using the table in the Detailed Bid template. 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 itemized list, but it should include the following:

Costs to the hosting institution:

1. **Conference venue rental costs**: This should include space for both the main conference and the workshops (these are often in separate spaces). For workshops, it can be useful to budget for some supplies such as easels, pads, and markers. If using a hotel and a room block is required, please include information about the costs if the room block was not met.
2. **Catering Costs**: Generally this means at the least coffee in the morning and at the mid-morning break, lunch, and a refreshment break in the afternoon. Depending on the venue and the accommodations, some conferences also provide a hot breakfast. A range of options should be provided including vegan and vegetarian options.
3. **Social Event Costs**: Two evening events (on other evenings attendees make their own arrangements) - see https://www.diglib.org/dlf-events/dlf-social-event-checklist/ for a useful set of guidelines on social events.
    a. **Poster reception**: Generally drinks and appetizers on the evening of the first day of the conference (not the workshop day). This is sometimes in a different venue than the main conference but often is in the same location.
    b. **Banquet dinner**: Generally at a venue different from the main conference. Include costs for rental and transportation costs if needed. Some hosts have itemized the dinner as a separate cost for participants.
4. **Keynote Speakers:** OR generally has two keynote speakers and provides an honorarium to each (usually around $1000) as well as travel, accommodation, and per diem.
5. **Mobile and Registration Platforms**: While the ORSC provides the primary conference website as well as the conference submission tool (ConfTool), the hosts will need to provide a registration platform as well as a mobile site such as Sched.
6. **Event recording and streaming costs**: ORSC expects a limited number of sessions (keynotes, plenary sessions) to be recorded and live streamed, but not the entire conference.
7. **Bandwidth and wireless costs, if needed**: OR attendees often are using several devices to connect to the internet; securing adequate bandwidth is critical to the success of the conference.
8. **Conference swag and supporting material**: While interest in ‘swag’ has declined over the past few years because of sustainability concerns, small printed programs, badges, and lanyards are generally useful to have.
9. **Event Insurance, if needed**: It may be useful to purchase event insurance to protect your financial outlay (in some cases, parent institutions may require it).
10. **Other**: Any other costs associated with the conference. For example, some host institutions have hired a conference organizer.

Income:

1. **Registrations:** Registration should cover the costs of the conference to the hosting institution once sponsorships and any other income are subtracted. The ORSC does not expect large profits and would rather see the cost to attendees kept as low as possible without the hosting institution suffering a loss.
2. **Sponsorships**: Estimate the amount that you expect from sponsors in order to offset costs.
3. **Other income:** Any other income that will offset the costs of the conference.

Costs per attendees:

1. **Travel costs**: Include approximate costs for attendees including costs for international attendees. If additional costs are involved to travel from the airport to accommodations, please include those.
2. **Accommodation**: Include approximate costs for a range of accommodations for attendees. If reserving a hotel block, indicate the cost per room.
3. **Per diem**: Include approximate costs for per diem.
    a. If helpful, the United States Department of State publishes per diem rates for foreign cities: https://aoprals.state.gov/Web920/per_diem.asp. See the cost of meals and incidental expenses rate (M&I) as an estimate, while noting that the conference should be providing some meals).
4. **Registration**: Please include the estimated registration cost per attendee.

Review process

Submitted bids will be reviewed carefully for the criteria required with close attention to the budget, logistics, and experience. The criteria for selection may vary from year to year primarily because of geographic considerations. In areas that need further clarification, the ORSC will seek clarity from the bidder. The successful and unsuccessful bidders are notified usually within two months. In general, the ORSC aims to select a bid in time to make an announcement at the conference; when this is not possible, we try to make an announcement no later than the end of the summer.

And if your bid is accepted?

If your bid is successful it will be important that you gather together a OR HOC as soon as possible. In particular, the ORSC will want to know the name of its Chair as soon as possible so that they can immediately become party to the wider planning process.The expectation is that the Chair of the OR HOC will begin to participate in calls as soon as selected since much can be learned from the planning of the previous years conference. Regular participation is definitely expected from July forward the year before the conference will be hosted. 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. We also hope that the Chair(s) can attend the conference immediately preceding their conference as there are at least two meetings (a debrief and a standing ORSC meeting) that are useful for knowledge exchange, and it is a tradition that the Chairs or their representative give a brief presentation on next year's conference in the closing plenary session.

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.

See Appendix D for a visual overview of the annual cycle.

August

Appointment of Program Chairs - ORSC

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

September

Appointment of Program Committee and Track Chairs - Program Chairs

The Chairs will appoint additional members to the OR PC 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 OR PC generally serve as Track Chairs. Tracks include Workshops, Posters, 24x7's, and the Ideas Challenge. The Chairs serve as the chairs for the General Track. These Track Chairs work with the wider OR PC but also take responsibility for their particular content block. In addition, the Chairs 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 OR PC will hold regular conference calls generally starting in September /October.

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

Working with the ORSC and Chairs of the OR HOC, the Program Chairs set the theme for the conference and begin to consider potential keynotes that could address the theme.

Review Communication Processes - ORSC

The ORSC maintains a directory of listservs, groups, and social media venues to target. Each September, the ORSC 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).

Develop Sponsorship Campaign - Host Organizing Committee

Create a sponsorship brochure 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 ORSC

Ideally the Call for Proposals is released in November. A large part of the OR PC work at this part of the cycle is determining what they want the skeleton of the program to look like: 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 OR PC 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 Chairs as signatories.
- The CfP should reference the Code of Conduct.
- The CfP should include information about the Fellowship 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 OR PC 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 ORSC

The OR PC, in collaboration with the OR HOC, 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 OR PC and OR HOC 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 OR 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 7 - Decisions sent to workshop submitters for confirmation of participation
- 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 Fellowships - Fellowship Subcommittee

Prior to the release of the CfP the Fellowships Subcommittee should decide how many fellowships 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. (Recently a Google form has been used.) 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 for future conference hosting - ORSC

The ORSC 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 call should include instructions and expectations for the EoI including a schedule for the next steps and a link to this document. This call should be distributed to appropriate communication channels. The ORSC should actively recruit potential hosts.

November

Call for Proposals and Fellowship Call Released - Program Committee with support from ORSC

The CfP should have a very broad distribution. The ORSC 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 minimize duplication. Effort should also be given to finding extra mailing lists that are relevant to any theme the conference might have and geographic location; 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 ORSC

In general, the earlier that keynote speakers (generally for both opening and closing) are identified and secured the better particularly if the OR PC is looking at high profile speakers. The OR PC should work closely with the OR HOC 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 OR HOC 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 ORSC 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. Reviewers can be loaded into ConfTool and managed there.

Open ConfTool for Submissions - ORSC

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 EoIs - ORSC

The ORSC should review the submitted EoIs 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 EoIs 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 OR PC. 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, therefore reviews for these are often distributed amongst the ORSC, OR PC, and OR HOC for timeliness.

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 OR 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 organizers 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 OR HOC to include in the registration process.

Select Fellowship Recipients - Subcommittee of the Open Repositories Steering Committee

The subcommittee for OR Fellowships should be ready to contact the fellowship recipients by the time Registration opens. This also allows time for recipients to make appropriate travel plans, apply for visas, etc. The Host Organizing Institution may need to provide additional support in the form of purchasing plane tickets, making hotel reservations, and supplying any documentation for visas.

Registration opens - Host Organizing Committee

Once workshops have been selected, the OR HOC 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 OR HOC 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 OR HOC is welcome to speak to the ORSC 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 ORSC 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 OR PC has a clear sense of how many submissions can be accepted in each track. This will require working with the OR HOC to understand the 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 OR PC 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 OR PC. The Program Chairs have final authority over acceptances and rejections. Once these are finalized, notifications should be sent using ConfTool. The OR PC should allow time to hear back from submitters whose submissions were designated to a different track whether they accept the track change.

Permissions to Record - Program Committee

If any sessions, including the keynotes, are going to be recorded and posted in the OR YouTube Channel, the program committee should collect the appropriate permissions from speakers.

Program Schedule Complete - Program Committee

Now that the decisions about content have been made, attention should be turned to fleshing out the details 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 Fellowship Awardees - Host Organizing Committee and Fellowship Subcommittee

Once registration opens and fellowship 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 - ORSC

Once all bids have been submitted, the ORSC 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 ORSC should seek clarity from the bidder. Once the ORSC 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 knowledge-base.

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 OR 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 ORSC Chairs

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

- A welcome from the ORSC 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 OR PC, OR HOC, and the ORSC;
- An overview of the number of submissions to the program and acceptances;
- An overview of the demographics of the registrants;
- Introduction to fellowship recipients;
- 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 Program Chairs should clearly communicate to the keynote speaker the time allotted to them.

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 Chairs or their representatives 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 OR 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, YouTube, and Zenodo repository). 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 OR HOC 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 OR HOC, OR PC, ORSC, 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 ORSC

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 ORSC

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 Chairs of the following year’s OR HOC. 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.

Attendee Survey - Host Organizing Committee with input from the ORSC

The OR HOC should distribute a survey electronically to all attendees 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 attendee survey should be collated and sent to the ORSC 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 organized. The ORSC 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 websites have been archived in the Internet Archive; once the website is finalized (including with links to presentations), work with the ORSC 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 organizers have retrospectively linked them from the website's conference program. All presentations are deposited into the OR Zenodo repository: https://zenodo.org/communities/openrepos.

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 OR HOC.

Accounting - Host Organizing Committee with OR Finance Subcommittee and CLIR

In due course, the ORSC 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 ORSC 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 E.

Review Steering Committee Membership - ORSC

In the month after the conference, the permanent members of the ORSC should review the membership. Membership is generally kept at 12-13 standing 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.lyrasis.org/display/or11/Membership+Policy.

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: Visual of Annual Cycle

Open Repositories Annual Cycle	Resource	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Appointment of Program Chairs	ORSC												
Appointment of Program Committee and Chairs	OR PC, ORSC												
Set Theme for OR Conference	OR PC, ORSC												
Review Communication Processes	ORSC												
Conference Website and Social Media	OR HOC												
Develop Sponsorship Campaign	OR HOC												
Finalize Call for Proposals	OR PC, ORSC												
Details of Fellowships	FC												
Develop and Issue Call for EoIs	ORSC												
Call for Proposals Released	OR PC, ORSC												
Keynote Speakers Identified	OR PC, OR HOC, OR SC												
Launch Sponsorship Campaign	OR HOC												
Identify and Invite Reviewers	OR PC												
Open ConfTool for Submissions	OR HOC												
Review Submitted Eois	ORSC												
Submission Closes And Reviews Begin	OR PC												
Venue Selected For Conference Events	OR HOC												
Select Fellowship Recipients	ORSC												
Select Workshops	OR PC, OR HOC												
Registration Opens	OR HOC												
Develop Rough Schedule For Program	OR PC, OR HOC												
Reviews Complete, Submissions Selected, And Notifications Issued	OR PC												
Permissions to Record	OR PC												
Program Schedule Complete	OR PC												
Arrangements Made for Fellowship Awardees	OR HOC, ORSC												
Selection of Full Bid for Conference Hosting	ORSC												
Prepping of Keynote Speakers	OR PC												
Management and Planning of the Ideas Challenge	OR PC												
Planning for Opening and Closing Sessions	OR PC, OR HOC, OR SC												
Preparation for Conference	OR PC, OR HOC												
Hold Conference	OR PC, OR HOC, OR SC												
Debrief Meeting	OR PC, OR HOC, OR SC												
Delegate Survey	OR HOC, ORSC												
Website Wrap-Up	OR HOC												
Website Content	OR HOC, ORSC												

Social Media Accounts	OR HOC, ORSC												
Accounting	OR HOC, ORSC												
Knowledge-base	OR HOC, ORSC												
Review Steering Committee Membership	ORSC												

Appendix E: What to include in the knowledge-base 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 ORSC does not dictate what tools are used in the process of managing a conference; however, the ORSC does request that certain data and documents are preserved in the LYRASIS 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 USA 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 F: Data Policies and Guidelines

Please see the OR Privacy Policy

Appendix G: Statement on Inclusion and Openness

Please see OR Statement on Inclusion and Openness

Appendix H: Guidance for Session Chairs

Please see Session chair guidelines