"How To" Guide - For Early-Career Researcher Trainings

This guide is intended to provide lessons learned and best practices for developing and implementing an early-career researcher-based training, including integrating educational sessions on interdisciplinary topics. Such a guide can be useful as a blueprint for future regional or national trainings that bring together students, post-docs, and early-career faculty members from research organizations, such as the USGS Climate Science Centers. The following guide is split into pre-event, the event itself, and post-event items to consider.

1. Pre-Event

Key Recommendation – A single person cannot develop and implement a successful event by his or herself – it takes a core team of at least 2-3 people in continuous discussion with a number of others in supporting roles. Assign specific roles and deadlines for each member of the project team.

The time periods stated below should be considered a minimum recommended time for completing a task prior to the event. Obviously, if these tasks can be completed earlier it will help make the process go more smoothly.

4-6 months prior to event

- Identify any institutional restrictions that you may have. e.g.,
    - 18 and over
    - Citizenship, visa status
    - Institutional waivers or releases of liability
    - Institutional talent releases for photography/video

- Identify overarching training session themes

- Create online application
    - Decide which early-career stage to focus on. (It may be challenging to create relevant curriculum spanning the full range from graduate student to early faculty)
        - Consider splitting into two general groups and
            - Masters and Ph.D. graduate students
            - Postdocs and early faculty (within five years of having graduated; planning to stay in region)
        - Either hold a different training for each of the two groups or hold separate tracks for each groups in the same trainings with overlapping activities when appropriate
    - Create sufficient questions to collect all relevant info you might need to make a decision on applicants (http://drive.google.com/ allows for the creation of free web forms)
        - Contact info
        - Major/discipline

        - Research area of focus
        - Letter(s) of recommendation
        - Short essay (~4000 characters) on why they would like to attend the training and how they feel it would benefit their future career goals
        - Short essay describing their research
        - Optional items to include
            - Gender
            - Ethnicity and race (see: http://nces.ed.gov/ipeds/reic/definitions.asp)
    - Include information about training (see announcement section below) in case someone is forwarded the application website only
    - Use a tracker mechanism (e.g., http://goo.gl/) to get an idea of how many people are interested, where they might be clicking through to the application from, and if you need to disseminate information additional times or to a larger audience
    - Send an immediate confirmation email when someone applies online so they know their application was received (make it an automated process if possible)

- Reserve hotels, vehicles, meeting rooms, catering, field trips, and transportation. Do this well ahead of time. You can always cancel. If exact timing is uncertain, consider reserving multiple days/times to make sure you are in the books.
    - Catering/food: find out if you have a dollar limit per person for meals to stay under and what the rules are in your grant or funding account to purchase food
    - Hotels: Ensure that you stay within federal limits (see: http://www.gsa.gov/portal/category/100120)
    - Follow all of your organization's purchasing policies and procedures for food purchases and housing contracts (allow sufficient time for approvals)
        - Allow sufficient time to set up vendors (some universities/organizations have vendor restrictions)

- Create event announcement (distribute to relevant groups/organizations)
    - Include relevant information about the event
        - Learning objectives and anticipated outcomes
        - Event dates/times (and portion of required attendance)
        - Tentative agenda
        - Requirements (see example institutional requirements above)
        - Funding availability
        - Lodging/travel options (include any monetary limits on available funding)
        - Approximate number of participants to be selected
        - Link to online application

3-4 months prior to event
- Application submission due date
- Process applications (have at least two people individually score all application essays, recommendation letters, and any other measures such as applicant overall suitability)
- Notify accepted applicants

    - Include finalized versions of all relevant logistical information about the training so applicants have what they need to officially confirm their participation (e.g., timing, funding, lodging)
- Receive accepted applicant's official confirmation of their participation
- Email those applicants not accepted after confirmations are due (in case you need to make substitutions). Keep the email positive and encourage them to apply to future similar events.
- Begin laying out an agenda
    - Mix up classroom lectures with other activities outside of the classroom
    - Provide sufficient time for breaks between sessions for networking
- Identify instructors/speakers for each session
    - Include end users/managers/stakeholders/decision makers
    - Invite dynamic speakers
    - Include a diverse group of speakers (gender, ethnicity, career stage)
    - Build the agenda around speaker schedules (approach those with the busiest schedule first and early and lock them into a spot; then build the rest of the agenda)
- Finalize Field Trips
    - Ensure that participants can enter secure facilities (e.g., check restrictions on foreign citizens in Federal facilities)
- Create tentative agenda (send to participants and instructors)
- Create small working group topics
- Test seminar room audio/video/recording capability
- Test all video web conferencing (Have a backup. Sometimes things work during practice but not live.)
- Find eligible drivers for local transportation (e.g., vans)
- Create a master list of required items (e.g., materials, audio/video, computers, food, beverages)

1-2 months prior to event
- Create detailed feedback form for participants
    - List each instructor, event, and trip separately to get detailed feedback on which aspects of the program were most successful and which could be improved
    - For written feedback portions have separate sections for positive comments and suggested improvements.
- Assemble instructor and participant bios to distribute to participants when they arrive.

3-4 weeks prior to event
- Create master "To Do" timeline spreadsheet with what everyone involved is responsible for throughout the week hour by hour
    - This not only ensures everyone knows their roles but also is useful in case of illness/emergency to one of those involved in helping
    - Keep list in a shared folder for all to see
- Create final agenda (have multiple people look over line by line)
- Acquire all materials needed (e.g., folders, pens)
- Print all documents to be handed out (e.g., agenda, activity instructions, participant/instructor bios)
- Obtain necessary parking permits for the training facility

1-2 weeks prior to event

- Acquire all speaker/participant presentations (or at least drafts that can be updated) so their compatibility can be tested on the computer used at the training)
- Purchase any beverages and food that can be stored

2. During Event

- Provide coffee and water at a minimum from 30 minutes before the event begins to the end
- Provide local transportation for attendees
- Be prepared to accept reimbursement for food from Federal employees, if they choose (typically, this is cash and they will need a receipt)
- At the beginning of each day, describe what is planned for that day and how it relates to the overall goals of the training
    - Also, at the beginning of each session, describe why the session was included and where it fits into the overall goals of the training
- Have a person identified as the designated "runner" during the week who can take care of unexpected tasks needing immediate attention (e.g., picking up someone from hotel who missed bus, food/snacks preparation, quick printing, computer setup help)
- Don't expect every detail of the training to work perfectly. Unforeseen things can and will occur.
- Encourage participants to fill out their evaluation forms daily so things are fresh in their mind.
- Have all training attendees fill out a Talent Release form if video/photos will be taken and used for informational/promotional material after the training is complete.
- Provide any participant compensation at the end of the training (and make sure participants know this ahead of time). This will help keep participants at the training throughout its entirety.
- Have someone designated to take photographs and video throughout the training
    - Conduct video interviews of participants and instructors throughout the week to get their impression of the training
- Provide opportunities to socialize outside of the training activities (e.g., at the hotel in the evening or a local restaurant).

3. Post-Event

- Make available to attendees:
    - Presentation video/slides
    - Photos
    - Speaker and participant bios or contact information
- Develop a means for all attendees to maintain contact after training is complete (e.g., social media, website)
- Invite training participants to future events associated with your organization