Workshop and Forum Guidelines

Congratulations!
Your workshop/forum has been approved, and a meeting planner has been assigned to work with you to make this event a success. This document will guide you through the process one stage at a time. The synopsis is illustrated in Table 1. The SEG appreciates your volunteer work on this event. It is efforts by volunteers, such as yourself, that allows the SEG to deliver quality programs to its members.

TABLE 1: Count Down to Event Synopsis

<table>
<thead>
<tr>
<th>Time Before Event (months)</th>
<th>Stage</th>
<th>Organizers</th>
<th>SEG Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>Proposal</td>
<td>- Seek support of standing committee (optional)</td>
<td>- Check for conflicts</td>
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<tr>
<td></td>
<td></td>
<td>- Submit Meeting Request Form</td>
<td>- Obtain approvals</td>
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<tr>
<td>16-18</td>
<td>Planning</td>
<td>- Form organizing committee</td>
<td>- Appoint meeting planner</td>
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<tr>
<td></td>
<td></td>
<td>- Plan format, description, schedule, venue criteria, keynote talks, etc.</td>
<td>- Investigate venue options</td>
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<tr>
<td></td>
<td></td>
<td>- Seek sponsorships</td>
<td>- Sign agreement with venue</td>
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<td></td>
<td></td>
<td></td>
<td>- Set production schedule and monthly meetings</td>
</tr>
<tr>
<td>15-11</td>
<td>Promotion</td>
<td>- Advertise event to colleagues</td>
<td>- Develop budget</td>
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<tr>
<td></td>
<td></td>
<td>- Develop targeted email list</td>
<td>- Design ads, web pages, registration form, etc.</td>
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<td></td>
<td></td>
<td>- Invite speakers</td>
<td>- Advertise in TLE</td>
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<td></td>
<td></td>
<td></td>
<td>- Announce call for papers;</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>- Send targeted emails</td>
</tr>
<tr>
<td>8</td>
<td>Call for Papers</td>
<td>- Solicit paper submissions</td>
<td>- Track submissions</td>
</tr>
<tr>
<td>6</td>
<td>Program</td>
<td>- Review papers</td>
<td>- Close submission</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Develop technical program</td>
<td>- Send out acceptances</td>
</tr>
<tr>
<td>5</td>
<td>Registration</td>
<td></td>
<td>- Open Registration</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Post program</td>
</tr>
<tr>
<td>1</td>
<td>Icebreaker</td>
<td>- Make schedule adjustments</td>
<td>- Close Early bird registration</td>
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<tr>
<td></td>
<td></td>
<td>- Chair sessions</td>
<td>- Confirm speaker registration</td>
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<tr>
<td>0</td>
<td></td>
<td></td>
<td>- Provide onsite support</td>
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</table>
PLANNING
(16-18 months prior)

In the planning stage, the full organizing committee is formed. At this stage, it is important to make the decisions that will impact the marketing materials, such as the call for papers brochure and the budget. The committee will make decisions about the focus and format of the event. The SEG meeting planner will research possible venues for presentation to the committee. Then the SEG will then execute a contract with the chosen venue. The meeting planner will also set the production deadlines for subsequent stages.

Forming the Organizing Committee

It is the responsibility of the Organizing Committee Chairman to populate the Organizing Committee. The chairman is encouraged to include young professionals on the committee as well as experienced members. The Organizing Committee is typically comprised of 6-10 people with an interest in the workshop/forum topic. It is also possible to use a smaller Organizing Committee of 3-4 people, but have a larger Technical committee, who review abstracts and serve as session chairs.

It is an honor to be asked to serve on the Organizing Committee, and the names of the committee are published on the meeting advertisements. The time commitment is typically 2-4 hours a month with a longer period required to review abstracts and generate a schedule.

It is the responsibility of the Organizing Committee to:

- Determine the focus and format of the meeting to make it a success
- Solicit presenters and sponsorships
- Review abstracts and organize the technical program
- Meet regularly with the meeting planner, usually via conference call.
- Attend the workshop/forum and serve as Session Chairmen during the event.

Deciding on the Focus and Format of the Meeting

Once the organizing committee is formed, it should discuss and make decisions on the following items.

1. Venue Selection: The committee may suggest possible venues or venue locations to the meeting planner. It may be useful to rank order a set of criteria, such as the following:
   a. Meeting room with quality projection capability
b. Auxiliary space for posters, breakout rooms or vendor sessions, if planned.

c. Inexpensive guest rooms for attendees

d. Proximity to international airports and other transportation

e. Sightseeing opportunities or resort facilities nearby

f. Options for alternative hotels and restaurants nearby

g. Availability of restaurants for special diets or Halal food.

h. Field trip or excursion options

2. Meeting Dates: The committee should suggest a range of dates that minimize conflicts. During the approval process, conflicts with other meetings were checked, but new events will continue to surface.

3. Expected Number of Attendees: The planner will estimate the expected number of attendees to be used for budgeting purposes. The planner and the committee should also determine whether or not to set a cap on the number of attendees.

4. Meeting Schedule: The committee should confirm the number of days for the event and basic schedule. Each workshop/forum begins with an Icebreaker on the first evening and technical sessions begin the following morning. There should typically be two technical sessions per day. Longer 4-5 day events often include a free afternoon for individual or joint excursions, and it may end by noon on the last day. The meeting planner can supply past examples to the organizing committee.

5. Meals: The event often includes one workshop dinner during the event. Coffee/tea breaks will be included midway between each session. Lunches will be provided daily to avoid the need for a long lunch break.

6. Students: The organizers may consider support for a limited number of student attendees. The standard student registration fee is only slightly reduced from full registration fees. A further reduction can be included in the budget with a slight increase for other attendees, if desired. Travel grants to students require the raising of sponsorship money for this purpose. (The SEG Foundation only offers travel grants to students to attend the annual meeting.) If funding is found for travel grants, an application method is suggested, such as requiring students to submit an abstract.

7. Sponsorships: The committee should discuss methods to solicit sponsorships. This should be done early so the sponsorship money can be included during the budgeting process. Funds can still be acquired later and the sponsors will be recognized on the web site and at the meeting. See Sponsorship section below.

8. Topic and description: A workshop/forum topic should be broad (or narrow) enough that a comprehensive, in-depth discussion of the subject matter is accomplished during the time period allotted for the event. The committee should draft a description for the event and supply it to the meeting planner for use in advertisements and in the Call to
Papers. The description generally includes a few statements on the motivation for the event and a list of topics to be covered. The later can later be used as session titles during the event. Examples can be found on the SEG website under “Past Meetings”.

9. Discussion in technical sessions: The committee should brainstorm ways to enhance discussion and interaction between the speaker and the audience as this is one of the goals of successful workshops and forums. The event should not be organized to look like annual-meeting sessions. Depending on the number of abstracts received, the committee has the flexibility to adjust the length of the technical talks and still allow ample time for discussion after each talk. In the past, prepared presentations have ranged from 15 minutes to 45 minutes. Examples of techniques for increased discussion include the following:
   a. Scheduled discussion time following each talk. For example, one forum had 15 minute talks followed by 15 minutes of discussion. 25 minute talks followed by 10-15 minutes of discussion are more typical.
   b. Discussion periods at the end of each session.
   c. Panel discussions on particular topics
   d. Breakout sessions: Groups can be split into multiple small groups or about 10-15 people to discuss posed questions and report back on their answers. This is a good way for some of the quieter attendees to provide input and to get to know other participants.
   e. Questions: The committee can develop a list of questions to focus discussion at the workshop. These can be included in the event description or be used for group or breakout session discussions.
   f. Posters: Posters allow discussion in small groups around the material.

10. Breakout sessions: The desire for breakout sessions should be communicated to the meeting planner early in the process before meeting space is contracted, so break out areas can be arranged with the venue.

11. Posters: Posters can be an effective way to accommodate many papers that would not fit into the schedule otherwise. They are more suitable for some event topics than for others. They also are an expense and may need to be acquired from an outside vendor. The meeting planner can advise the committee about the cost of adding a poster session. The Poster session will be set-up in another meeting room or foyer outside of the general session room, and poster presentations can begin with a brief 5 minute PowerPoint introduction of the Poster in the general session room, if desired.

12. Vendor Session/Reception: At times some Organizing Committees may wish to hold a vendor session or vendor reception in conjunction with the workshop/forum. While this
is not a common component of a workshop/forum, it does occur. See below for more description.

13. Abstracts: The committee should decide whether or not to require abstracts and if so the length of the abstract. They should also determine if they will be published and in what format. Typically, forums have not required abstracts. In this case, speakers are asked to supply a title and a brief description. The description is not published and is used to place the presentation in the appropriate session. One of the main purposes of the abstract is to have some basis for accepting and denying papers. It may be difficult to get presentations on the latest work if an extended abstract with multiple figures are required, considering the time required to get data permissions. Some workshops require a 1-2 page abstract with one figure and make a 4 page abstract optional. The committee has flexibility to waive the abstract requirement or to extend the deadline for specific presentations.

14. Posting of abstracts in print or online: If abstracts are collected for the workshop or forum, they will be distributed to meeting attendees only. They will not be published online or in print as a collection from the workshop/forum without the author’s permission. If the Organizing Committee determines they would like to publish abstracts online from the workshop/forum, the SEG Meeting Planner will collect all abstract permission forms from speakers who agree to allow their papers to be shared with all attendees and then will work with Publications to create an online portal for the abstracts.

15. Invited Speakers and Keynotes: The organizers should develop a list of potential invited speakers and keynote speakers. Keynote speakers should be invited early and are typically given longer time slots at the beginning of a session. Speakers also can be invited later if the initial response of the Call for Papers is disappointing. The committee may choose to make an abstract optional for invited papers. They are not need for selection purposes, but the authors may choose to have an abstract included with the rest that are presented to the participants. The deadline for these abstract can be the date that they go to press.

16. Logo. It is the business office responsibility to create a Logo.

Finding a Venue

The assigned SEG meeting planner will work with the suggested cities for the meeting and research prospective sites to determine the best location for the workshop/forum. Once the research is completed the SEG meeting planner will present options to the Organizing Committee. They will discuss the options and then take a vote to determine the city for the
workshop. The SEG meeting planner will handle all communications with cities, hotels and convention/conference centers and off-site venues. It is the responsibility of the SEG Meeting Planner to choose the venue for the event.

SEG members and Organizing Committees do not have the authority to enter into verbal agreements or contracts that would obligate the Society in any manner, legally, financially or morally. This policy is in place to relieve the committee member from any threat of personal liability due to the action incurred on behalf of the Society. Signature authority for all contracts and agreements is the responsibility of the Executive Director.

**Soliciting Sponsorship**

1. It is the responsibility of the Organizing Committee to seek and acquire sponsorship for their workshop/forum.
2. The SEG Meeting Planner will create the sponsorship opportunities brochure, as well as the sponsorship commitment form.
3. A signed commitment form must be signed and returned to the SEG Business Office before a company can be considered a sponsor of the event and their logo used.
4. A minimum amount of US$1,000 per company sponsorship must be received. This is considered the minimum amount a company can contribute to be considered a sponsor of a workshop/forum.
5. Sponsorship for workshops/forums can be sought for the following categories: Icebreaker Reception, Group Dinner(s), Lunches, Coffee Breaks, Student Registration, Speaker Registration and Attendee Gifts: Each sponsored item can have multiple sponsors, unless otherwise noted.
6. Each sponsored item will have a minimum dollar amount in order to be considered a sponsor. Suggested amounts of sponsorship for each category per item by the Board of Directors:
   a) Students and faculty registration fees- US$5,000 per sponsor
   b) Dinner or Icebreaker Reception- US$5,000 per sponsor
   c) Lunches – US$4,000 per sponsor
   d) Tote Bags/Attendee Gifts - $3,000
7. Each sponsor will receive the following benefits for sponsoring a workshop/forum
   a) Company logo on website & all marketing collateral as a sponsor
   b) Company logo on all workshop advertisements
   c) Company logo on all on-site promotion branding & technical program
   d) Company logo on a slide between technical sessions
e) Word of thanks & mention from chairman
f) Company logo on signage at the entrance of the sponsored event and other general meeting sponsorship signs.

9. Companies are not allowed to sponsor their own employees with sponsorship money used to sponsor the workshop/forum.

Vendor Sessions/Receptions

The following are the guidelines for participating/hosting an optional vendor session/reception:

a) SEG will provide a room separate from the general session room at the host hotel.
b) SEG will work with the host hotel to determine the maximum number of vendors we can accommodate.
c) SEG will provide electricity, one (1) table, two (2) chairs and passes for two people per company.
d) Vendors do not need to be registered for the workshop/forum.
e) SEG will provide light hors d’ oeuvres and cash bar for this event.
f) Each company must pay to be involved in this event. They must each pay $1000 to participate.
g) There must be at least five (5) vendors participating in order for this event to occur.
h) Each company will be recognized as a participant of the Vendor Session/Reception on the workshop/forum web site, but not a sponsor of the workshop/forum.
i) The committee must determine the need for a vendor session before the budgeting process is complete. It cannot be added after the budget has been approved.

SEG Business Office Responsibilities

The SEG Business Office and the assigned SEG Meeting Planner will work on the workshop/forum from beginning to end. The SEG Meeting Planner and Business office will handle all of the research, contract negotiations, contracting, planning, budgeting, submission of marketing pieces including the web site update, mass emails, print ads in TLE and other designated publications and E-Newsletters, communications with hotels, registration, and communication to delegates as well as payment of all invoices. Below are a list of things the SEG Meeting Planner and SEG Business Office are responsible for handling during the Planning Stage:

1. Sending notices for Committee Meetings and setting up conference calls.
2. Create a Production Schedule of deadlines for the committee as well as the SEG Business Office. (See example)
3. Hotel/Venue research
4. Contract negotiation and signature of the Executive Director on all contracts.
5. Placement of the meeting in SEG’s publication calendar and web site will occur after dates are confirmed and the contract is signed by the SEG Business Office/Executive Director.
PROMOTION
11-15 Months Prior

In the promotion stage, the SEG will create a budget and develop advertisements, the Call for Papers announcement, and registration forms. The budget is required for setting registration fees. The organizing committee helps advertise the workshop to their colleagues and solicit papers.

It is good to have the advertisements on the web and in TLE approximately a year or so before the event. In this way, the event will make the list when some companies allocate their annual travel. There are also advantages to having some promotional material at the SEG annual meeting in the fall. If the title, location and dates are known, a slide can be generated to be presented between talks during the technical sessions.

Organizing Committee Responsibilities
The organizing committee is responsible for personally soliciting presentations and getting the word out about the event. In particular, each member should obtain presentations from his or her organization, if possible.

A personal approach is often more effective than newsletter or TLE advertisements. The organizing committee can generate an email list for the meeting planner, who will then send out targeted emails to individuals. The organizing committee can suggest individuals who they know are working in the field. In addition, the committee members could also do a search on the SEG Digital Library and identify the authors of papers who are publishing recent papers relevant to the topic. An email can be composed stating that the recipients are receiving the email because of their recent work in the field and inviting them to present a paper. The email will then include a link to the Call for Papers. This approach may be particularly important if the initial response to the Call for Papers is slow.

SEG Business Office Responsibilities for Promotion
1. Creation and approval of the workshop/forum budget, setting the registration fee.
   Marketing will establish the registration fee for the workshop/forum.
2. Creation and approval of branding and marketing pieces for each workshop/forum including the logo.
3. Creation of the meeting marketing pieces, web page, mass emails, print ad creation and placement, on-site materials, and on-site signage.
4. Manage sponsorship program by collecting the sponsorship money, thanking the sponsors and placing their logo on the web site and signage.

Financial Procedures and Budgets

1. Budgets will be created by the SEG Meeting Planner based upon a standard template for workshop/forum events.
2. The SEG Meeting Planner will determine true, actual costs for each line item in the budget.
3. Each workshop/forum will be assessed a management fee that represents the actual and indirect cost of SEG staff with the exception of workshops/forums taking place under an existing MOU/MOA. This fee covers the cost of doing business and includes the cost of staff beyond their salary. The cost recovery method is the same for all SEG programs and is set by the SEG Board of Directors.
4. Workshops/Forums with existing MOU’s or MOA’s will follow the financial clauses in the agreement.
5. Workshops/forums that originate outside of a Standing Committee can be assessed a meeting reserves fee based on the advice of the marketing department. SEG programs such as workshops and forums help support the organization and other programs, such as student chapters.
6. Whenever possible, all expenditures and service agreements for US $5,000 (five thousand dollars) or more require competitive bidding from at least three vendors.
7. Once the budget is complete it must be approved by the SEG Sr. Manager Conventions & Meetings Operations and the SEG Sr. Manager, Marketing & Communications. They will then set the registration fee for the workshop/forum based on the projected number of attendees.
8. Once a budget is approved and a registration fee is set, it cannot be adjusted to reflect changes in attendance, sponsorship or other expense/revenue variables.
9. It is the responsibility of the SEG Meeting Planner to monitor all expenditures. The SEG Meeting Planner will keep expenses in line with the budget.
10. Variable expenses: Food and beverage, attendee gifts, USB for abstracts may exceed the amount budgeted commensurate with an increase in the number of registrants. Other budgeted expenses directly involved with income producing activities may be exceeded provided the additional expenditures are offset by additional income.
11. Invited Speaker, Keynote speaker and organization committee expenses (including airfare, hotel, meals, transportation and registration) will not be built into the budget. These expenses are the responsibility of the individual speaker or organizer.
12. The SEG is responsible for Payment of invoices and for budget monitoring.

**CALL FOR PAPERS**

*8 months prior*

The Call for Papers will be created by the SEG Business Office and distributed through various marketing methods, including mass email, print publications, E-newsletters. The Call for Papers should be announced and distributed at least six months prior to the workshop/forum.

All paper submissions are submitted to the SEG directly either via the web or by email to the meeting planner. The meeting planner will track all submissions and communicate with the authors. Periodically, the meeting planner will send abstracts to the organizers for review. If the paper submission is slow, the organizers may elect to extend the time for paper submission or issue more invitations for papers. It is important, however, that the abstracts are then reviewed in a timely manner so that participants can be notified in time to make travel arrangements and to prepare and release the talks.

**TECHNICAL PROGRAM**

*6 months prior*

The organizing committee will review and agree on the papers to be accepted and to be rejected. Typically the full committee reviews each abstract, but they may agree to divide up the abstracts. Abstracts with a commercial feel and message should not be accepted. The Organizing Committee will notify the SEG Meeting Planner of the papers accepted and rejected by the date established in the Production Schedule.

The Organizing committee will then develop the technical program. The Organizing Committee will submit a grid of daily sessions and talks in each session for the workshop/forum to the SEG Meeting Planner. The SEG will formally format the program and post it on the website.

In developing the technical program, the organizers should assign a time and duration for each presentation putting it into the appropriate session. Sufficient time for discussion should be included. A mid-morning and mid-afternoon coffee break should be scheduled. It is advisable to make breaks at least 20 minutes long, and to schedule the morning break no later than 2 hours after the start of the session. Lunch breaks are typically 1-2 hours long. The meeting planner can provide example programs.
Unfortunately, it is likely that a few papers will be withdrawn before the meeting. For this reason, it is good to have some flexibility in the schedule such as the ability to length some of the discussion sessions. Some authors submit papers but indicate that there is a possibility that they may not get the data examples released in time. It is up to the organizers to decide whether or not to put the paper in the schedule, knowing that there is a risk that they may have to compensate for the paper being withdrawn. If the purpose of the workshop is to obtain the latest and best data examples, they may be willing to take the risk. Because there will not be competing sessions, the schedule is more flexible than at an annual meeting.

The SEG office handles all communication with delegates regarding registration, presentation status, meeting deadlines and general meeting information. After the schedule is complete, the Meeting Planner will notify authors of their presentation status through an email letter. If accepted, the date and time will be provided, along with instructions on the talk preparation. Scheduled talks should be informal and utilize MS PowerPoint or Adobe Illustrator for their oral presentation.

**REGISTRATION**

The SEG Meeting Planner and SEG Business Office Staff will be responsible for all aspects of meeting registration, including preparation of forms, web site links, processing payments and sending confirmations to attendees. The meeting planner will also communicate with the hotel/venue regarding sleeping rooms, room needs, set-up and food and beverage needs as well as on-site changes.

1. At times the SEG Business Office may offer multiple rate categories such as member, non-member, student, and other categories as appropriate.
2. The registration will cover the entire workshop. Single day or two day passes will not be available for workshops/forums, even for speakers.
3. Any person attending a workshop/forum must register and pay for their registration. No complimentary registrations will be given to the organizing committee members, Invited Speakers or Keynote Speakers to attend the workshop/forum.
4. All registrants must pay prior to the first day of the meeting. All invoices must be paid prior to the meeting or their registration will be cancelled.
5. Registrations on-site are discouraged, but sometimes occur. If someone registers on-site they must pay by credit card. Cash is not accepted on-site.
6. First priority registration is given to organizing committee members and speakers.
7. If the workshop/forum has reached its maximum capacity of registered attendees, additional registrations may be put on a wait list.
8. Refunds will be given to attendees that cancel their registration 30 days prior to the first day of the workshop/forum. A $50 fee will be deducted from the refund as an administrative fee. No refunds will be given to people cancelling the registration less than 30 days prior to the beginning of the workshop/forum.
9. Invited Speaker, Committee Member and Staff registration fees will not be discounted beyond the standard Early Bird discounted rate. These fees are the responsibility of the individual speaker, committee member or staff.

**EVENT**

The organizing committee and the meeting planner should meet briefly before or after the icebreaker to make last minute adjustments. It is not uncommon to have a speaker not make the workshop, and adjustments may be needed.

**Sessions**

The Organizing Committee Chairman should open the meeting on the first morning by introducing the Organizing Committee, thanking sponsors, etc. The chairman should outline what the workshop will encompass and what participants should expect.

One or two session chairman should be selected for each session. The chairmen will serve as the moderator, time keeper and facilitate discussions at the conclusion of the talks. The session chairman should control and stop any “sales pitches” or domination of a session by any one person, clique or faction during the discussion time.

During the sessions, especially for a Forum, extensive note taking is discouraged, and digital recording and photography during sessions are prohibited, except as arranged by the SEG Meeting Planner.

**Onsite Support**

The meeting planner will handle onsite registration and set up of the Registration area for the distribution of I.D. badges and all delegate meeting materials. The planner will provide on-site support to the chairman and Organizing Committee as well as assisting attendees. All printing
and USB production is the responsibility of the SEG Meeting Planner and the SEG Business Office, including the supplier selection.

**POST-EVENT**

**Post-event evaluation questionnaire**

The meeting planner will work with SEG marking to develop a post-event evaluation questionnaire. The evaluation will be emailed to each attendee the last day of the workshop/forum. Each participant will have at least two weeks to complete the evaluation.

Participants at each workshop/forum shall also be asked to recommend future topics by completing a post-event evaluation questionnaire. Topics can be proposed by any person at any time to the SEG or to the Chairman of a standing committee. These topics shall be collected and collated by the SEG Business Office and provided to standing committee chairs and/or potential Organizing Chairs.

The meeting planner provides a post-event report to the Organizing Committee within five (5) business days of the conclusion of the meeting as well as a post-event financial report within sixty (60) business days of the conclusion of the meeting. The result of the evaluation will be analyzed and distributed to the organizing committee after it is received from the participants.

**Post-event publications**

Some workshops elect to publish a special issue of TLE or Geophysics based on material presented at the workshop. In this case, the organizers first contact the editors of the journal to propose a special issue. If accepted, they serve as special editors and solicit papers from the event presenters. The organizers typically write a summary of the workshop and introduction to the section.

Publication of information disclosed at a SEG workshop/forum is prohibited without written approval from the author. The author is free and is encouraged to publish his/her own contribution. Forums typically encourage presenters to speak informally and, for this reason, may not seek publications summarizing the forum.

**ADDENDUM**
At times special requests can occur that are outside the scope of these guidelines. If a situation arises that is not outlined above, please contact the SEG Sr. Manager Conventions & Meetings Operations to discuss the issue and reach a resolution to the issue.