The Glasgow ‘How to...’ guide for researcher-led activity
Welcome!

As a researcher, you are expected to engage in at least two weeks of transferable skills training a year. However, that doesn't always have to be through formal training courses. A significant proportion of your professional development will come from actually putting into practice the things that you have learnt and trying out your own ideas.

The University of Glasgow has a history of supporting researchers to engage with their academic community and create their own opportunities for networking, presenting their research and sharing ideas or information. This could be anything from organising a mini-conference or workshop to starting your own reading group or even launching an international journal.

Organising an event, conference or research network is an excellent way to gain vital 'employability' skills such as project management, problem solving and team working. It can also provide tangible evidence of these skills for your CV or interviews. It's also a great way to boost your academic profile. As an event organiser you'll get your name known in your research field, make key contacts for the future and also get one to one time with invited speakers.

We asked around and other top reasons to organise your own event were:

- ✔ You get to invite people that you are interested in hearing speak
- ✔ It gives you and your colleagues an opportunity and platform to present your work (perhaps leading to publication)
- ✔ You feel more of a part of your academic community
- ✔ A good way to make friends in your department
- ✔ It can plug specific gaps in your CV (e.g. managing a budget)
- ✔ Find out how things work 'behind the scenes', such as finance, room bookings and catering

This guide has been created with the help of researchers who have been there, done that and lived to tell the tale of their events. We hope it will give you some ideas and help make sure everything runs smoothly, with minimal stress and that your event planning is a positive experience, as well as one that gives you a great addition to your CV.

Many thanks to everyone who contributed and shared their stories for this guide!
1. The planning stages

Before you start planning anything, you should establish your event **aims** and the intended **audience** (including how many people you expect).

Put together a project team. If you’re running an event, you will always need extra pairs of hands on the day even if people don’t want to get involved in the pre-event organisation. Draw up a task list, including when each task needs to be done by and who is going to do it. Doodle is a free and simple to use tool which can help you organize dates for meetings and get everyone’s availability. [www.doodle.com](http://www.doodle.com)

Design the format of your event and choose speakers, exhibitors and Chairs for each session. If there is a particularly important speaker, their availability may determine the date for your event. Otherwise, finding a suitable space to hold your event is often the deciding factor. This is represented in the events management triangle, where each corner is a particular constraint. Once you have decided which is the most important then you will have to be prepared for the other two to be flexible: if you change one, you’ll probably need to change the other.

![Events management triangle](image_url)

**Choose which of these 3 is the most crucial.**

**Fix this first and you will have to be prepared for the other two to be flexible.**

If we’ve missed something out just let us know: e.adams@admin.gla.ac.uk
2. Managing finance and finding funding

‘it’s worth trying at least! Even if some "informed" people says there is nothing, or it’s impossible to get any funding’

| Piggy Bank | • Apply for funding  
|           | • Draw up a budget for your event  
|           | • Find out how the Finance is managed in your Department (who will be the budget holder? Do they need to set up a new budget code?)  
|           | • Decide if you are charging a delegate fee and how much this will be |

Each year, the University sets aside funding for researcher-led initiatives: [http://www.gla.ac.uk/services/researcherdevelopment/newinitiativesfunding/](http://www.gla.ac.uk/services/researcherdevelopment/newinitiativesfunding/)

However, this is not the only source of funding and it may even support your application if you have approached or secured other sources. Depending on your event, this could be from the professional body in your subject area (e.g. the Royal Society of Chemistry), industry contacts (best to ask around your Department for this) or the AHRC collaborative training scheme.

Make sure you read any funding criteria carefully to check that you’re eligible and try to work out what the funding is really intended for. You should then tailor your application or bid to suit or you may choose to ask for funding for a specific part of your project which looks most likely to be in line with what the funders are interested in. For example, the New Initiatives fund cannot be used for research-specific activity. However, it could be used to fund a training element of an event which also contains research-specific activity.

**Some useful information when it comes to managing a budget:**

First of all, a very common mistake is to expect the use of University rooms and lecture theatres to be free. Sadly, that’s often not the case. For ‘external’ events and particularly where you’re charging people to attend you will have to book the venue through the conference and visitor service and pay accordingly. [http://www.gla.ac.uk/cvso/](http://www.gla.ac.uk/cvso/)

**Budget holders** will normally be university staff so to set up an account for your project you should speak to someone in your Department who can help you with this. Once
they have the 5 digit budget code, this can be used to pay internal suppliers (such as catering or printing).

The University has a list of approved suppliers that you should use. However, if you’re using a non-approved supplier for a one-off purchase, this can be paid using a sundry payee form.

If you are employing someone to deliver a workshop, they should invoice you for this or you may have to register them as an atypical worker (if they don’t have their own company to allow them to invoice you). This can be quite complicated and requires more than one form. Find someone in your Department who can help you with this! You can also offer speakers a travel expenses form. This is cunningly referred to as a ‘sundry payee form’. They will need their receipts for this and it has to be signed by the budget holder and returned to Finance, General Ledger. [http://www.gla.ac.uk/services/finance/downloadaform/](http://www.gla.ac.uk/services/finance/downloadaform/)

The first thing to decide is whether you will be charging a delegate fee for attendance. Once you have a budget made up, you’ll be able to decide how much this should be.

You will probably need to pay deposits for venues etc. well before you have received any fees and your Department (or any grants you have received) may help you with this. Check when the final balance is required and also any cancellation fees or important dates. Mark these in your diary or calendar so that you know when you need to confirm final numbers for accommodation etc. and don’t end up overpaying.
3. The nuts and bolts of organisation

- Book your venue and add ‘extra’ costs to the budget (e.g. janitorial cover, AV hire, poster boards hire or transport)
- Book catering (they can cope with rough numbers at this stage)
- Invite and brief speakers on both length / content of talks and also practical matters like getting to the venue
- Ensure participants have all the information they require (e.g. send out joining instructions)

Room Bookings and furniture
For an internal event, choose which room you want and book through Central Room bookings using the teaching room form:
www.gla.ac.uk/services/estates/crb_bookingaroom.htm

If you’re going to be eating make sure you have somewhere for tables etc. Sometimes these can be put up in the corridors outside but it’s best to check, either with central room bookings or the estates and buildings staff in the actual building. You should also check with them about getting tables for a registration desk.

Some other considerations are whether you need a flat floor or lecture theatre, maximum numbers, proximity to breakout rooms or an area for a poster session.

Some unexpected costs are janitorial overtime, which you need to pay if you are using rooms after 4.30pm (usually around £33 per hour). Central room bookings can advise you if you need to pay this.

If you are holding a conference with delegates from outside the University and you are charging people a delegate fee then you will have to book rooms through the conference and visitor service. www.cvso.co.uk/services/cvso/conferenceevents/

They will be able to help you with AV requirements and poster boards. You will be required to pay a deposit to confirm your booking so will need to ensure you have a conference budget account set up. There are also sets of poster boards in some Graduate Schools or departments so ask around for these.

If you are not organising your event through the conference service you should ask your Department to source poster boards as there isn’t a University central stock. It can cost around £500 to hire them for an event but even if you manage to borrow them, you’ll need a way to transport them (and several volunteers to put them up and down).

Catering
If you are going to buy catering, you should ask people to register for your event to ensure nothing is wasted. If you are on a tight budget and unsure how many people are going to turn up for a networking session after an event, it’s probably best to under-cater.
Menus and booking for the University catering services can be found here [www.gla.ac.uk/services/hospitality/forstaff/functiondeliveryservice/](http://www.gla.ac.uk/services/hospitality/forstaff/functiondeliveryservice/). If you have booked your rooms through the conference service they will also organise the catering for you.

A common mistake is to forget to order water or soft drinks!

You should ensure that you ask delegates to specify whether they have any special requirements (dietary or otherwise) when they are registering for your event. When you book your catering, you can give approximate numbers and finalise these closer to the time, along with any dietary requirements.

**Briefing speakers:**
You should brief speakers prior to the event, including information on:

- Exactly what you expect them to talk about
- Who their audience is (number of people, subject area, level of experience).
- Who else is speaking (e.g. give them a copy of the programme) to avoid duplication
- How long their talk and the question time should last
- How to get to the venue (Campus maps are available here [www.gla.ac.uk/about/locationmapsandtravel/mapsandtravel/maincampusmap/](http://www.gla.ac.uk/about/locationmapsandtravel/mapsandtravel/maincampusmap/))
- Whether you will be paying travel expenses and if there is an upper limit to cost (note that you can arrange for car parking through the main campus security)
- What facilities the room has

Find out what technical requirements your speakers might have for their talk (e.g. sound, video, internet access, flipchart) and ensure these are available. Let your speakers know if you’d like them to send you their presentation in advance (usually a good idea if you’re unsure about videos working as it gives you time to test them out). If they are bringing their presentations on the day make sure you factor in time for these to be loaded up before the event starts or during a break. Assign someone in the conference team to make sure this happens.

**Participant information** (sometimes called joining instructions)  
This should be sent out to participants prior to the event and will include information on the conference programme, the venue (include travel directions and maps), catering and accommodation arrangements.

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<th>What goes in a delegate pack?</th>
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<td>• Participant list</td>
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<td>• Programme</td>
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<td>• Blank paper</td>
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<td>• Fliers etc. from exhibitors</td>
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<td>• Pens</td>
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<td>• Feedback forms</td>
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4. Advertising

Some sources of free publicity include the TV screens in the Fraser Building and 1a the square (email hospitality@gla.ac.uk with a .jpg file and explanation of your event.) The Stevenson building may also be willing to put something up for you for free if it’s a student event (they normally charge for outside advertising). You can also have your event added to the list of University events: [www.gla.ac.uk/events/](http://www.gla.ac.uk/events/) by sending an email to ccevents@admin.gla.ac.uk. These are also automatically added to the list at the back of campus news.

Colour posters can be printed by the university print unit. You’ll find a rough idea of costs on their website: [www.gla.ac.uk/stafflist/?action=list&id=X09](http://www.gla.ac.uk/stafflist/?action=list&id=X09)

Make sure that you agree with event sponsors whether they would like to be acknowledged on posters. This might be through a logo or text (e.g. 'supported by University of Glasgow Researcher Development')
5. On the day

Even if they don’t have a specific job to do, it’s useful to have lots of people who are around to help if need be.

**Setting up the room**
- Load presentations and check they work (especially sound / videos)
- Turn on the microphone (if you’re using one)
- Ensure internet access is working if this has been requested
- Put signs up (make sure you bring blue tack and a couple of marker pens in case you need extra signage)
- Ensure speakers have access to water during their presentations

**Speakers and helpers**
- Make sure all the organisers know the location of toilets, break out sessions, lunch etc.
- Check if external speakers need somewhere to store their luggage or would like a taxi booked for the end of the event
- Have copies of travel expense forms for speakers (sundry payee forms: [http://www.gla.ac.uk/services/finance/downloadaform/](http://www.gla.ac.uk/services/finance/downloadaform/)) and make sure they know who to return these to as they might need their actual receipts for the journey home so will have to post them later.
- If there is a conference chair, make sure they have a watch or can see a clock
- Assign someone to look out for external speakers and tick off their names as they arrive – and to tell you if the speakers haven’t turned up!

**Delegates and materials**
- Make sure feedback forms available (and a box to collect these in at the end)
- If you have namebadges, you can set these out in alphabetical order on a table. You might also want to collect these at the end to reuse them so have a box ready for this near the door
- Is there a sign-in sheet or delegate packs to be given out on arrival
6. Chairing a conference or workshop session

The role of a conference or workshop Chair can be varied and you should clarify with the organiser exactly what it involves. Here are some things you might have to think about and tips from those who have done it before.

**Introducing the event and speakers**
First of all, make sure you introduce yourself. You will normally have to welcome both the participants and the speakers to the event and may also be in charge of housekeeping announcements (e.g. location of fire exits, lunch etc.) You should be prepared to give a short introduction to each speaker (if this is required). You should discuss what to say with the speakers before the event but it would normally include where they’ve come from, their background and any major accomplishments. Also remember that this is eating into presentation time so keep it brief.

**Keeping to time**
One of the most important jobs that you have as a Chair is to keep the event running to time. Speakers should be aware already of how long they have for their talk and questions but it’s probably a good idea to go over this with them again. You should also let them know whether you will make any signal or perhaps even hold up a sign when they have five minutes left or have run out of time.

If a speaker does run over time, try to keep questions to a minimum or you may choose to move onto the next speaker and say that questions will have to wait to the break. This is something you can mention to the speakers before the event so they are aware of how it will work. You should make sure you know what time each speaker starts so that if the person before has run over time the next speaker is not penalised for this. If someone is running over and doesn’t look like they’re going to stop (despite waving or signals from yourself) then you could try standing up as this makes it more obvious that time is moving on.

**Managing question time**
Stand up and face the audience to do this. If you are in charge of fielding questions then it means you stay in charge of time and can move on to the next speaker when appropriate. You should also have one or two questions ready yourself in case the audience don’t ask any straight away.

- Be able to introduce the speakers
- Keep everything running to time
- Be prepared to make decisions on what to do if things do run over (e.g. whether to cut the questions or the tea break)
- Know the venue, including fire exits, toilets and the locations of other sessions
Closing the event
Thank everyone for coming (including speakers and audience) and make sure people know where they are going next (e.g. if there is a buffet or other workshops). You might also be responsible for asking people to fill out feedback forms or give back their badges.
7. After the event

- Debrief meeting
- Thanks to speakers etc.
- Report to funder
- Sort out the finance
- Party!

Make sure you thank all the speakers and also keep them informed about travel expense payments etc. Ensure all invoices are paid. If you have any queries about this, speak to your departmental contact or Elizabeth Adams.

It’s a good idea to have a final meeting with your conference team to discuss how it went, what you’ve learnt, what you’d do differently next time and any future plans. If you have received funding or a grant for your project, you may have to write a final report and should check when this is due and whether there is a template for it.

Here’s some advice from Michael Morris, founder of the Glasgow Caribbean Network, on keeping your project going, after an event:

Think about if you want to develop or sustain the positive elements of the event so that it’s more than just a flash in the pan. For example do you want to have a regular group meeting about the themes that were raised? Or set up an email group? Or try to get something published- maybe a special issue in a journal or setting up a website?

For example, we’ve just had a conference and the AHRC wanted to know how we’d disseminate the themes of the conference before they’d give us money. So we will approach journals to try to get a special issue on the conference theme. This is the way other delegates advised, rather than a conference collected papers which nobody seems to like.

Finally, don’t forget to pass on anything that you have learnt and think should be included in this guide (e.adams@admin.gla.ac.uk).

Good luck and let us know how it goes!