



DEVELOPING PROPOSALS FOR NSF WORKSHOPS AND NSF RESEARCH COORDINATION NETWORKS (RCN)

September 13, 2017

Alicia J. Knoedler, PhD
**Executive Director, Center for Research Program Development and
Enrichment**
aknoedler@ou.edu

Goals and Overview

- Understand opportunities that come with hosting a workshop, conference, or research network meeting
- Meeting essentials to consider
- Funding opportunities and where to find them
- General things to consider about meeting funding
- Q&A

Definitions

- **Seminar** – typically features a single speaker whose work or presentation is being featured. The audience is likely to be small (fewer than 30 people)
- **Symposium** – a gathering in a field of study to hear experts expound on their work, usually within a defined theme or focus. The gathering may include 50 or fewer participants, depending on the presentation topics.
- **Workshop** – a gathering that emphasizes active learning, participation, and engagement of the audience in the context of a specific theme. The audience may consist of 80-100 participants.
- **Conference** – experts brought together to discuss, share, recent research or education findings or to expose other researchers or students to new research and education techniques; may focus on US and/or international researchers. Audience is likely to be large (250+ participants)
- **Research Network Meeting** – group(s) of investigators communicating and coordinating their research, training and educational activities across disciplinary, organizational, geographic and international boundaries. Network may include 100-250 members.

Why host a gathering of scholars?

- Unique idea for a gathering
- Provides a way for funding agencies to get a sense of the current state of the discipline/research area
- Develop new partnerships, collaborations
- Increased visibility for host, host institution, and/or sponsor
- Confirmation of expertise, of host and participants/attendees
- Provide an opportunity to encourage interdisciplinary work from multidisciplinary colleagues
- Opportunity to include students
- Opportunity to actively decide to include underrepresented groups
- It's your turn

Meeting Essentials

- Easy to get to venue(s) – remote locations must offer significant and unique value
- Accommodations – state rates, inexpensive, group rates, close or includes the meeting venue(s)
- Food – Reasonable cost, caterer, timing aligns with meeting agenda, consider diet needs, soft drinks, alcohol (?), snacks
- Technology – registration, marketing, wi-fi, reliable presentation technology, expect to pay for technology assistance, registration portal, means to distribute presentation slide decks, power strips
- Informational Materials – to print or not to print..., bound copies, paper, pens, post-it pads/markers, name tags
- Registration table – staff at the tables, on-site registration(?)
- Recognizing sponsors – printed materials (programs), tote bags, water bottles

NSF Funding Opportunities for Gatherings

- Conferences: https://www.nsf.gov/pubs/policydocs/pappg17_1/pappg_2.jsp#IIE7
- EPSCoR Workshops: <https://www.nsf.gov/pubs/2012/nsf12588/nsf12588.htm>
- Research Coordination Networks: <https://www.nsf.gov/pubs/2017/nsf17594/nsf17594.htm>
- INCLUDES Workshops and Conferences:
<https://www.nsf.gov/pubs/2017/nsf17111/nsf17111.jsp>;
<https://www.nsf.gov/pubs/2016/nsf16081/nsf16081.jsp>
- Conferences and Workshops in the Mathematical Sciences:
<https://www.nsf.gov/pubs/2016/nsf16550/nsf16550.htm>
- Biological Sciences: <https://www.nsf.gov/bio/ios/confworkshopguidance.jsp> and
<https://www.nsf.gov/bio/mcb/confworkshopguidance.jsp>
- Consider *Dear Colleague Letters*: Public Participation in Science, Technology, Engineering, and Mathematics Research: Capacity-building, Community-building, and Direction-setting:
<https://www.nsf.gov/pubs/2017/nsf17047/nsf17047.jsp>
- For some existing NSF grants, you can request a supplement to host a meeting

NSF Conference Proposals (generic)

Description found in the Proposal and Award Policies and Procedures Guide (PAPPG)

7. Conference Proposals

- NSF supports conferences in special areas of science and engineering that bring experts together to discuss recent research or education findings or to expose other researchers or students to new research and education techniques. NSF encourages the convening in the US of major international conferences.
- A conference proposal will be evaluated through the regular NSF merit review criteria of Intellectual Merit and Broader Impacts, and, will be supported only if equivalent results cannot be obtained by attendance at regular meetings of professional societies.
- Although requests for support of a conference proposal ordinarily originates with educational institutions or scientific and engineering societies, they also may come from other groups. Shared support by several Federal agencies, States or private organizations is encouraged.
- A conference proposal should generally be submitted at least a year in advance of the scheduled date. Conferences, including the facilities in which they are held, funded in whole or in part with NSF funds, must be accessible to participants with disabilities.

General Things to Consider...

- As with all funding, fit the funding and the idea
- Know the limitations, restrictions, applicability of funding opportunities:
 - EPSCoR workshops are only for EPSCoR states to host
 - Not all directorates participate in all opportunities
- Read solicitations and search for info that can provide insight into NSF's thinking about the funding opportunity
 - Example: RCN: Additional information about the RCN program and its impacts may be found in Porter et al. 2012 *Research Coordination Networks: Evidence of the relationship between funded interdisciplinary networking and scholarly impact*. **BioScience**, **62**: 282-288
- Program officers hold the cards in determining conference funding - build relationships with program officers!

General Things to Consider...

- Don't do this alone – form a steering committee
- Push the boundaries with your meeting
 - Go beyond the 'usual suspects' – broaden participation
 - Consider interdisciplinary topics and the big picture questions to be addressed
 - Make recommendations to NSF as a result of the meeting
 - Don't repeat past meetings – innovate!
 - Consider active participation and not just panel after panel of disconnected speakers
- Create a realistic budget and then increase it by 25%
 - Pay staff to help, don't pay yourself – conference services?
 - Cost of registration/money collecting software/service (e.g., EventBrite)
 - Most of the money should be spending on rentals, food, honoraria, materials, transportation if the hotel and venue are different, evaluation
 - Charge for registration if needed but think about discounts
 - Costs for marketing the meeting?

General Things to Consider...

- Think ahead about what you want as impacts and outcomes of the meeting
 - Collaborations, additional activities as a group
 - Follow-on meeting
 - Production of scholarship together
 - Guidance to others
- Some parts of NSF really like to fund programs that impact broadening participation of underrepresented groups, students, team science, STEM education. Not all meetings are focused on a disciplinary area
- Meeting evaluation will likely be required – consider the timeline
- A meeting report will be required – consider the timeline
- If you have never organized a formal meeting of colleagues before, join with someone who has or join a new or ongoing effort to gain some experience

If I were proposing a meeting...

- I would start with an area that NSF wants to address
- I would find out who they have funded in this area – they are known to NSF
 - I would invite these individuals to be speakers and/or as part of the steering committee
 - I would find out other meetings they have attended related to this area
 - Were there any reports from past meetings?
- I would form a diverse steering committee of individuals from different institutions (potentially international), including underrepresented groups (multiple dimensions)
 - I would meet electronically with this group every two weeks at first and more frequently closer to the date of the meeting
 - I would try to meet with this group in person, depending on the timing
 - I would make sure everyone knew their role on the committee and as a contributor
 - I would identify a staff member who will work with me on logistics the entire time
 - The steering committee contributes all the way through the final report
- Many of the logistical details will flow from the steering committee
- Most of the meeting would be interactive discussion, not panels of speakers

Conference Services at OU

- <https://pacs.ou.edu/about/conference-services/>
- Preferred on-campus meeting venue: **Thurman J. White Forum**
- They can help organize meetings at other locations as far north as Oklahoma City
- Truth be told, most faculty work with OU staff to help plan meetings
- Consult with CRPDE for current contacts
 - crpde@ou.edu



Q&A