ARCHIVAL EDUCATION & RESEARCH INSTITUTE

2013

Host Team Report

Sarah Buchanan, Lorrie Dong, Pat Galloway, Jane Gruning, Sarah Kim, Carlos Ovalle, Katie Pierce Meyer, Ciaran Trace

AERI 2013 Host Team Report

The work carried out on AERI 2013 in Austin was done primarily by a team consisting of Pat Galloway and Ciaran Trace as faculty and members of the program committee; seven PhD students (and former AERI participants) who participated at various levels and carried out various tasks: Lorrie Dong, Katie Pierce Meyer, Sarah Buchanan, Jane Gruning, Sarah Kim, Carlos Ovalle, and Virginia Luehrsen; several iSchool staff members, including our Finance Manager Kamar Nassor and administrator Ann Seago; a team of Master's student volunteers; as well as minor tasks and advice from other members of staff. We also sought sponsorships from the UT School of Information (SI), the Briscoe Center for American History, and a student group, the Cultural Heritage and Information Preservation Society, to assist in paying for items that were not covered in the final budget.

The UT Office of Sponsored Projects approved the Institute project on August 1, 2012, but we didn't begin meeting until after SAA, beginning in early September 2012. At first we met every other week as we discussed the basics of what should be done, moving to every week in 2013 as we began to do it. In this report we will cover the various parts and pieces of the AERI task, attributing each segment both to those who wrote it up and those who did the work.

In general, we began early planning in September 2012 and toward the end aimed to complete all preparations by May 30, two weeks before the beginning of the Institute. Had we not set such a deadline for assembling all the requirements for the Institute, we would not have had the remaining two weeks to polish our preparations. The segments that follow have been arranged roughly in chronological order.

UCLA Contract and Budget: Pat Galloway (assisted by Kamar Nassor and Ann Seago)

Planning summary

Progress toward the contract could not be made until the budget for the first AERI grant (2009-2012) had been closed out with IMLS. This meant that what we knew of our budget was what had been explicitly stated in the "AERI II" budget for 2013, and this was confusing because we knew full well that this might not have been the budget actually received (especially considering possible effects of the sequestration of federal funds). A new item that we had never heard of came up as well, in that lawyers for UCLA insisted that UT had to take out insurance to hold UCLA harmless for anything that happened to attendees while in the hands of UT contractors; red tape abounded on both ends, since lawyers came into the picture on the UT side as well.

Lessons learned

I think this was the most difficult struggle of all, because it affected almost everything we did. We did not actually receive a signed contract until March 2013, and when we did, we found that the money was not always distributed under categories that we could use, or was distributed in a lopsided way. In short, we found that universities may interpret Federal budget categories differently and that lawyers don't always understand what our activities are about. Having as explicit as possible a contract in place as soon as possible is much to be desired.

Time frame

Negotiations for the contract began in September and lasted until March, and although we were able to secure most large scale commitments, especially those for housing and meeting spaces, both the delay in the contract combined with the almost realtime nature of hospitality budgets made it impossible to have a “complete” budget almost until the last week before the Institute.

Housing: Pat Galloway

Planning summary

We began negotiating for housing in October, assuming that we would be able to set up for the number of rooms we wanted pretty easily. We found, however, that the rhythm of scheduling for dorms for use for summer meetings does not really rev up on the UT campus until spring. That fact, combined with the fact that we did not know how many attendees we would have and no certain budget, made this part difficult to resolve until late April-May. However, we were fortunate in that there was never any doubt of the dorm we would use: a new dorm (San Jacinto) that was set up for this use in the off season and thus had the meeting rooms we would need, thus mitigating possible high temperatures. We also found that we could take care of most attendees’ breakfast and lunch needs on the same contract with a “declining balance” card that could be used in the small cafe in the building as well as the two dining halls in a larger dorm next door. Further, Housing and Food Services could well handle the break refreshments for the meeting. This meant that if we could work out the budget, an enormous part of the cost could be dealt with on one check.

Lessons learned

The sooner specific commitments can be made for housing and meeting spaces, the better, at least for the committee’s sanity, although it was clear to us that making Housing aware of the likely scale of our needs (75-100 people to be housed and fed, 3 conference rooms all day on most days) enabled them to set aside a block that would work. We worked with the same people throughout beginning in the fall, but things began to go more smoothly as we began to work more exclusively with the middle-level Housing representative (Nick Fomin) who would actually be responsible for our event. We were lucky that the building we used had good soundproofing, so that although there were some 2-3 other events going on at the same time, we were rarely inconvenienced and sound bleed from other meeting spaces was not a problem.

Time frame

The relationship with Housing lasted from October to the end of the Institute, but was most intense during May and June as final setups were locked down.

Conference Meeting Rooms: Pat Galloway, Katie Pierce Meyer, Lorrie Dong, Carlos Ovalle)

Planning summary

Pat was in charge of booking the conference rooms, dorm rooms, and breaks (see above). At the beginning of April, Katie began projecting which conference rooms we would needat what times, based on the tentative AERI program. Using the week at a glance program, she created a schedule spreadsheet, by day, with columns for session, space needs (people), room (based on occupancy guidelines for the meeting rooms), notes about room setup, and the cost of the space. As the schedule required last-minute changes, Katie changed the spreadsheet to track our modified conference room needs and added room numbers to the program that Sarah Buchanan and Sarah Kim were working on. When we decided in May to accommodate separate activities for junior and senior faculty on Student Day, we were able to obtain the use of locations at the SI, roughly three blocks from the San Jacinto dorm, at no cost. We also made use of this location for the poster session, thus obviating the necessity to bring the posters to another location and making pickups for the downtown mentoring dinners scheduled after the poster session more convenient.

Lorrie, Carlos, and Katie visited the San Jacinto conference center and met with Nick Fomin to check the rooms we would have and make sure we knew how A/V would be set up. During that meeting, we were told we would have two rooms with projectors, but another group was booked for one. I met with Nick a second time to determine how they could best accommodate our group and we decided to combine two rooms to allow for a greater capacity. Carlos, a member of the SI IT staff and PhD student, was able to borrow projectors so that we had three on hand, one for each room that we used.

The room changes did require late changes to the contract and to the draft of the printed program. The conference room confirmation process did require several extensive emails, to make sure we had the correct rooms for each day. Pat, Ann, and Katie each examined the schedule and the room assignments to effectively communicate what was needed to the San Jacinto conference staff.

<u>Lessons learned</u>

Get documentation of the specific rooms you have confirmed early on. We were told we had different rooms booked that would not have required our additional A/V setup and that were larger. Looking at the way these contracts are written by Housing staff, they lumped several rooms in together, so despite our discussion of which rooms would be ours, there was nothing formalized about the specific spaces until very late in the game. It is also important to visit the spaces to make sure they work well for the conference. Check to see if all A/V setups are operational (preferably the day before the conference begins); we found that it was worth checking the setup daily, and Carlos was able to do this. The equipment borrowed from the SI worked well, but there were issues with a Housing-supplied projector during the first session.

<u>Time frame</u>

Katie became involved with conference room assignments in late March, projecting the spaces for each session at the beginning of April as the program began to take shape. Creating the schedule and room assignment spreadsheets was time consuming but allowed us to see when we would need each space and to project the costs. The space visits took place on May 10 and May 14. On May 24, Katie was asked by Pat and Ann to look over the conference room assignments and found errors, so she broke down which rooms we would need for each day and Ann communicated the information to Nick. We received the correct room confirmation on May 30, the deadline we had set ourselves for completion of all arrangements.

Conference Logo Design: Sarah Kim

<u>Planning summary</u>

The AERI Austin 2013 Planning committee began considering having a conference logo early in October 2012. Ellen-Rae Cachola at UCLA informed us that there is no “official” logo for AERI in general, while a triangle design, which first appeared on the AERI UCLA Website in 2007 as a decorative element, has been inconsistently used as a branding image for AERI. While the planning committee discussed hiring a designer, Sarah Kim volunteered to design a logo. In the design process, she focused on emphasizing the acronym ‘AERI’ and what it stands for, incorporating the triangle design and its color scheme into the logo in order to provide feelings of continuity.

<u>Time frame</u>

Sarah received the triangle design from Ellen-Rae Cachola via e-mail on October 9, 2012. She spent five days drawing several sketches by hand and two days creating a digital image using Adobe Photoshop. She disseminated two potential logo images to the planning committee on October 18, asking them to vote which image they preferred. She continued to make modifications to the logo preferred by many committee members and made it available for the planning committee and Ellen-Rae Cachola to use on November 10.

Website and Email: Sarah Buchanan, Virginia Luehrsen, Sarah Kim, Carlos Ovalle, Lorrie Dong

Planning summary

Website: At our first AERI meeting in the fall, a group was constituted to establish and prepare content for the website and open up an AERI email account through the School; this group evolved as tasks naturally combined themselves and became completed). The initial website, designed by Virginia Luehrsen, was established on Nov. 28 at http://www.ischool.utexas.edu/aeri2013/; the AERI email, aeri@ischool.utexas.edu, was established by Carlos Ovalle on an SI server on the same date. We discussed and revised the wording of the AERI text as a committee and decided to place all this text on the website, rather than within the application form itself, while ensuring that the application forms were accessible via the website.

On the AERI website, the first things to be posted in December were the application forms, scholarship forms, and Travel and Accommodations information (including pictures Sarah B. took from touring the dorms in November). After registration concluded, we posted participants' bios, the preliminary schedule, an Explore Austin page, and a Presenters' Information page. The AERI website was established such that any of the Austin committee members could access it, but in May, as we narrowed responsibility to one checkoff for each segment, Lorrie took over making updates to the website, as it was during this time we needed to make specific and timely updates to keep the schedule and information on accommodations and travel as updated as possible. Sarah Kim made aesthetic and functional improvements on the AERI website in May as well.

When the CFP that we prepared was distributed in mid-December by Ellen-Rae Cachola through the central AERI mailing list at UCLA, we began receiving inquiries on the local AERI email, and some of us were assigned to answer these or forward them to Pat for her to answer. The AERI email received all the applications by February 3, and those of us checking the email occasionally replied back to applicants for additional information or clarification. For example, we confirmed receipt of materials and began storing the application materials on the AERI webspace. Once the process of applicant proposal review was completed by the Program Committee, we sorted applicants via Excel spreadsheet by category and sent the appropriate emails. We used the AERI email rather than our personal emails to communicate with attendees. Overall the AERI email account was very active and monitoring it was definitely a coordinated effort.

Lessons learned

Once Carlos had the website and email set up, the AERI process could really begin in earnest. Maintaining an up-to-date website and email are two important tasks for local AERI committees. The AERI email and website through the SI worked well and had no major issues with storing files. Thanks to Carlos and our IT staff, we had our AERI website established prior to distributing the CFP in December. A lesson might be not only to assign the responsibility of monitoring the AERI email to a single person but also to make sure that inquiries are answered by those who can best speak to the issue of the inquiry.

At our meeting in late April, Katie prepared a running list of sessions and events with items in red noting people who had not yet registered, and items in blue noting where we need to make some decisions or apply decisions made to those areas - such as some session chair assignments. Pat helped us complete the session chair assignments having received volunteers in that regard. This document formed the basis for posting the schedule to the AERI website in early May at: http://www.ischool.utexas.edu/aeri2013/schedule.html.

The conference website is a publicly accessible place where potential participants as well as people who are interested in AERI can find up-to-date information regarding the conference. The conference website could be launched as early as when the planning starts and used more actively in order to help interested individuals stay engaged.

Time frame

The AERI Austin 2013 website account was set up by Carlos Ovalle and Virginia launched the initial conference website on November 28, 2012. On May 20, 2013, Sarah Kim redesigned the outline of the website in order to increase the visual display of information. It took approximately three hours to re-design the website using Notepad. Lorrie Dong updated information on the conference website when it was necessary. On June 20, as many AERI participants arrived at Austin and started tweeting, Sarah Kim added #aeri2013 Twitter live feed to the conference website that displays the most recent tweets about AERI 2013.

Call for Proposals, Acceptances, and Registration: Sarah Buchanan, Pat Galloway, Lorrie Dong, Carlos Ovalle, AERI Program Committee

Planning summary

At our AERI meeting in late October the members of the local arrangements committee broke out into initial groups to begin making firm arrangements: Website and Forms, Content (CFP, press release, posters), Reservations/Budget, Activities and Events, and Student Committee. Using the application form from 2012, the Content group was tasked to make edits and tailor the CFP toward our plans for AERI 2013, based on feedback obtained after AERI 2012. Specifically, we asked student applicants to submit proposals for just one activity, and encouraged faculty to participate as mentors or chairs. We sent the CFP text to Kelvin White, who provided us with his CFP for the EASP scholars as well as the EASP application form. We sent the CFP text to Ellen-Rae at UCLA, and she sent a message on December 14 to the AERI listserv announcing that applications for scholarships and proposals for presentations, posters, and workshops would be accepted until February 3, 2013. The EASP deadline was set for April 8. Completed forms were to be submitted via email to our AERI email. We also posted the CFP on our website and posted a page each for doctoral student, faculty, and EASP applicants which provided the forms for their scholarship application and workshop, paper, and poster proposals.

When we sent acceptance emails on March 19 (following the application deadline of February 3), we stated that information on how to register would be forthcoming shortly. Carlos Ovalle took the registration form from 2012 and created a web-based form that would load captured data into a database. This page was secure, with special access given only to a few Austin committee members who would need to check the list of registrants for planning and finalizing the program. On April 2, we notified accepted applicants of the April 15 deadline.

Lessons learned

The goal for setting the dates for milestones in the planning process should be to send out the

CFP before winter holiday break, which means the committee should be equipped to receive and keep track of applications from the time the CFP goes out. Given that we sent out our CFP in December, we gave applicants a solid month (January) to prepare their applications, but we were operating under a more compressed timeframe, with AERI in June.

In editing the text accompanying the application forms, we sought to separate general AERI information from information needed to complete the application, so we placed all the general text about AERI on the website, and made the application a *fillable form*. We were also very interested in limiting participant biographies to a maximum of 250 words (500 words for paper/poster) and bolded this request on the form. We hoped the use of fillable forms would enable us to dump all the completed forms into a database and have it extract the text from particular fields (but this didn't happen as planned).

Our forms were successful in terms of enabling us to gather the information we needed from applicants in order to begin to construct the week's schedule, although our failure to indicate several items as separate fields, including firstname, lastname, and proposed title, was a mistake that other AERI committees might want to rectify. It is impossible to work efficiently by sorting on full names, and some proposers failed to provide even a tentative title in their proposal text. The sooner the CFP goes out, the more time the committee will have to work with the Program Committee to construct the preliminary schedule and post it publicly. We received several inquiries wanting to see the schedule, on which we worked with the AERI Program Committee before posting it to the website. We also received requests from applicants wanting to be scheduled for a certain day or early/late in the week, although making this an overt choice at CFP time might defeat the purpose of encouraging extended presence for most participants at AERI.

Another complexity, which in moving toward diversity and the inclusion of participants on less well-worn professional paths has begun to emerge, was trying to determine how people fit into the categories that had been provided for in the budget (students, junior faculty, senior faculty). It was difficult, for example, to decide who was a junior faculty member when several untenured people presented with many years' experience both in practice and in teaching. Pat prepared a list of "problematic" cases for the the PIs to decide on, since such decisions were significant for determining whether participants would receive scholarships.

<u>Time frame</u>

This process lasted from December through April.

Program (Performative and Printed): Pat Galloway, Sarah Buchanan, Ciaran Trace, Katie Pierce Meyer, Sarah Kim

<u>Planning summary</u>

Meeting in the fall as a planning committee taking account of the feedback from AERI 2012, our team outlined some ideas that had been expressed for the 2013 program and that concerned us from a logistical standpoint, such as: consistent lunch breaks, themed paper sessions, fewer plenaries, mentoring dinners, and reception location. Many of these ideas were contingent on reading through the applications after the due date of February 3 and identifying things that applicants didn't offer to present. Since there was a request from 2012 that workshops be chosen both to continue topics from the past and to open new topics, Ciaran Trace and Sarah B. also worked together in performing a mini-content analysis of prior AERI workshops, which resulted in six themes we identified as suggestions for applicants in the CFP and workshop guidelines.

In terms of designing the framework for the program for the week to accommodate numbers of paper sessions and workshops proposed, and bearing in mind the 2012 feedback requesting workshops of longer duration, in mid-February Lorrie, Sarah B., and Katie split up the work of filling in a spreadsheet containing the fields: applicant name; country; scholarship request; proposal type; student / faculty; and title + notes. This information was gathered from the applications stored in the AERI account on the SI server. To prepare structured data for Program Committee consideration, we tentatively sorted papers into potential paper sessions and gave paper sessions preliminary descriptions. We found that were all papers and workshop proposals to be accepted, paper sessions would need to have 3-4 papers and workshops might take one or two time periods, setting aside Wednesday for Student Day as in 2012. At a later meeting we gave names to the sessions, and in late February, we sent this one-page preliminary program together with proposals to the AERI Program Committee for evaluation of proposals and comments on the rough program. On March 19 we sent out acceptance emails and on April 2 we posted the online registration page: http://gremlin.ischool.utexas.edu/aeri and notified all accepted applicants to register by April 15. Also on this registration form, we requested attendees to supply the title of their presentation for the program.

Planning for the printed program began on March 27, when Sarah B. visited UT Copy with an example of the 2012 AERI program as a model and received a cost estimate for printing 125 books (later finalized at 115 books), and further instructions for preparing the electronic file (booklet printing), which she shared with Sarah Kim, who would design the program. For most of April and May, Sarah B. prepared the program content and kept it updated as changes were made. She used the AERI email to ask participants for clarification where needed, and shared these updates with Lorrie, who was by this time serving as the AERI webmaster. Sarah K., having already designed the AERI 2013 logo, and designed and laid out the final Word file content to produce the final PDF for printing.

Sarah Kim received the contents of the conference program in Microsoft word format from Lorrie on June 1, 2013. She designed the program layout and produced a draft copy of the program using Microsoft Publisher on June 1. It took approximately seven hours for her to produce a ready-to-print booklet style program in PDF form. she disseminated the draft to the planning committee for reviews on the same day, then sent the finalized program to UT Copy center on June 3. The calculated price was $554.74 for a total of 115 books. Each book consists of 44 tabloid sized pages (88 letter sized pages) with a color cover and black and white interior option. Sarah received a proof on June 7, which she shared with Pat and Ciaran to proofread. She sent back the revised program on June 10, and UT Copy center delivered 115 conference programs to the SI on June 12.

<u>Lessons learned</u>

As the program developed, inevitably changes had to take place. This year, we had multiple withdrawals from people who had applied to AERI, received a scholarship, and then withdrew in April or May citing other commitments, which was very frustrating, particularly when it left a paper session bereft of good content.

It is advisable to have a procedure in place (prior to the application deadline) for reviewing application submissions and distributing student and junior faculty scholarships, so that acceptance emails can be sent shortly after the application deadline (particularly since all eligible applicants have been accepted in the past). We sent materials on proposals to the Program Committee that had met at AERI 2012 for vetting as soon as we were able to work out a tentative program with enough slots to accommodate potential participants. Because we did not receive an official budget until after these decisions had to be made, it was difficult to clarify scholarship amounts and registration fees.

Other lessons would be to continue and streamline further the online submission of forms, as we found this a much-needed improvement. The SI's finance staff was able to begin the processing of reimbursements prior to the week of AERI. To keep track globally of the whole process, we discussed using software such as EasyChair instead of the manual-digital renaming and foldering of application materials and the forwarding of proposals that we did this year. This would enable the automation of especially early evaluation of participant proposals, particularly important if we develop a competitive track for formal AERI papers.

In order to be cost effective and reduce the use of paper for printed programs, it is recommended to limit the length of participants' presentation abstract and bibliography and the use of references and footnotes in the abstract.

<u>Time frame</u>

Other than the activities such as tours and evening events that have become traditional to AERI, we could only begin designing the program schedule for the week of AERI after the application deadline. For most of February and March, the process consisted of slotting proposals into a schedule, receiving critiques of proposals, and sending out acceptances; for April and May the process involved finalizing this schedule, assigning room numbers, and keeping the program and website updated daily.

Student Day: Lorrie Dong, Katie Pierce Meyer

<u>Planning summary</u>

Based on feedback from AERI 2012, Student Day for AERI 2013 was to have an explicit international focus. This included having non-U.S. doctoral students on the student committee. An email was sent out to the AERI listserv that asked for non-U.S. participants. Efforts were also made to contact doctoral students in Latin American countries, since that is a region that is generally not well-represented at AERI and because of the proximity to Texas. Of the responses we received, the local student committee chose two people based on their extensive prior AERI participation. We then had meetings (a hybrid of in-person and virtual) about once a month until AERI to plan the day, drawing also on previous Student Day experiences.

<u>Lessons learned</u>

We felt that it was important for this committee to meet in-person and so sought to use a virtual presence method to assist those who were elsewhere. We found that the best virtual conferencing program is Vsee—we had a lot of connectivity issues with Skype. We also probably did not need to meet as frequently as we did.

Expect a lower number of student participants in Student Day than there are student attendees at AERI. A noticeable number of people seemed to take this day off. We had about 2/3 attendance of students at Student Night. Accordingly, it may be useful to take a pollnearer to the time of AERI to see what activities/workshops/etc. students would like to have on Student Day.

Decide early on whether sessions will be open or closed to faculty.

<u>Time frame</u>

The selection for the AERI Student Day Committee started in early October 2012. Meetings started in November 2012, and basically met once a month until AERI.

Dinners

Opening Night Dinner: Lorrie Dong

Planning summary

The opening night dinner was held at the Alamo Drafthouse – The Ritz, a movie theater in downtown Austin. This was a slightly unconventional venue for AERI, but it ended up working well because of the food/drink options available at the theater, the film theme of the event, the enthusiasm of the local archivists, and the ability to have buses take people to the venue. Planning for this event began in fall of the previous year to scout out possible locations. While on-campus venues were considered, it was decided that the costs (for catering, etc.) would be just as expensive as having the event off-campus.

Lessons learned

It seemed to be best to have one local committee member be the primary point person when working with the venue, and this person should be willing to go meet with the venue coordinators in person. The biggest issue with planning this event was starting the contract and programming processes without having the money in hand. This made planning the event extremely stressful in the months leading up to the conference because it was not 100% certain we could go through with having the opening night dinner at the chosen location due to costs.

We did learn that when working with a venue not on campus, and on behalf of a state school, one should make sure to inquire about tax exemptions. Also, it is important to be aware that you may need to get contract approval from your university's Office of Accounting, Contracts & Grants, which could take several weeks.

Depending on the program and venue, you may need to hire someone to manage sound and lights. In our case, this could not be a volunteer effort.

Time frame

We started getting in touch with the appropriate Alamo Drafthouse contacts in November 2012 (a good seven months before AERI) because we were looking for potentially free venues. The pace was pretty leisurely until about early March when we started contacting local film archives about participating; finalizing the participants and the films did not happen until the week prior to the event in order to accommodate some of the participants' schedules. The menu was planned about two months before the event. The coordination intensified in the last month before the conference, when the schedule was finalized, films were selected and tested, buses were confirmed, and the contract was signed off on.

Mentoring Dinners: Katie Pierce Meyer

Planning summary

We began looking at restaurants at the beginning of AERI planning, drawing from previous conference lists developed at the SI (EPOCH, PREx, ICHORA) and personal experience. In April, Lorrie, Jane, and Katie used a set of spreadsheets to organize restaurants by area of town, focusing on Downtown, South Congress, East Austin, Campus, and Manor. In the end we decided to send attendees out, via buses, to three districts (Downtown, South Congress, East Austin) in Austin for the faculty/student mentoring dinner.

In order to give people a choice of restaurants ahead of time, Katie created a Doodle poll for faculty to select which restaurant they would prefer, providing a spreadsheet that identified the districts, listed each restaurant, and provided the website address, a description of the cuisine, and price range. Once faculty responded to the Doodle poll, a new spreadsheet was created summarizing their selections a new Doodle poll out to students with their faculty/restaurant options (two restaurants were dropped due to lack of interest, one because of transportation concerns).

Lessons learned

We did face two restaurant obstacles: one was fully booked for a private party and another couldn't accommodate us at a convenient time. In retrospect, it would have been wise to call each restaurant ahead of time to make sure there were not other events scheduled. We could have set up a reservation at each and then called back to modify the final number, but that might require more phone calls than necessary. Luckily, Lorrie was able to move a group to one of the most popular options and we picked another downtown restaurant that had room.

The key issue we faced was coordinating the transportation with restaurant selections. It behooved us to have people select restaurants ahead of time so that we could make reservations and schedule buses for each Austin district. Sending out the poll(s) earlier could have helped with the pressure to schedule buses.

Time frame

The Doodle poll was sent to faculty on May 28, with a May 31 deadline. The second Doodle poll that identified faculty restaurant selections was sent to students on June 3, with a June 10 deadline.

Researching and documenting restaurants took a lot of time, but was spread across people and over several months. Setting up the Doodle poll, revising the spreadsheets, and responding to messages regarding the dinners required 2-3 hours per week in the weeks leading up to AERI.

Student Night Dinner: Katie Pierce Meyer

Planning summary

We began discussing Student Night Dinner plans during the AERI student planning committee on December 18, 2012. Since we did not have a finalized budget, it was unclear how much money we might have for the student night dinner. Katie began looking into several options: Austin Pizza, Ego's, and the Texas Underground, to ask about rental fees, etc. We did consider requiring a small fee for it on the registration form for any student who wanted to attend, but opted to look for an inexpensive option to avoid having students pay. A few places that are relatively close to the dorms and conference venue were contacted, thinking that we could have dinner close to campus, and then if people wanted to go out afterward, they could take taxis or the bus downtown and beyond.

The Texas Underground (located in the student union building) proved to be a relatively inexpensive option in a campus location. We could reserve the majority of the space, order pizza through their dining program, and provide an environment for students to actively interact and network. The student night activities, held on Wednesday evening, gave students a chance to reflect on the student day content, discuss the AERI program so far, and think about the future of AERI as a community.

Lessons learned

Planning the event on campus allowed us to use an IDT (inter-departmental transfer) to cover the cost of the event. We did overbudget for the evening, requesting $750 to cover the cost of food and space, but the total bill came in just under $500.

We did have to complete an Official Occasion Expense Form, which was faxed to the Underground ahead of time. Luckily, Ann Seago and Kamar Nassor in the SI were very helpful with handling the budget and paperwork necessary to coordinate payment for the event. It is necessary to develop a good working relationship with people who understand the financial processes at your institution, as Ann and Kamar were an integral part of making student night happen.

Time frame

The options were researched by checking their websites for rental information. Katie called the Texas Underground in January 2013 and was given basic prices for the rental space and food options, but told that reservations for Summer 2013 would not be taken until the end of the Spring semester. She visited the UT Union Underground on May 2 to set up the reservation, after calling again to confirm that they were accepting reservations. Dinner recommendations were then made to the Student Day planning committee, which helped me clarify how many and which types of pizzas should be ordered. The pizza and salad orders were placed in person at the Underground on June 10.

Faculty Dinner on Student Day: Pat Galloway

Planning summary

A fair amount of time was spent just contemplating which restaurant to use for the faculty dinner, which would include both junior and senior faculty. We considered several, but ultimately, when we knew what the budget would be, settled on the convenient and reliable possibilities at the AT&T Conference Center on campus, which we had used in 2012 for the ICHORA banquet. In the event this dinner was the easiest to plan, as all we had to do was telephone last year's contact and ask for a quote to do the same thing again.

Lessons learned

Working with a well-known provider is blissfully easy.

Time frame

The reservation for this event was made in April; final details were established at the end of May.

Transportation to Off-campus Venues: Lorrie Dong

Planning summary

We were unable to make firm reservations for the buses until about a month before the conference because of uncertainties with the budget. The buses were high price items—for example, a 33-person vehicle cost $80/hour. The ability to have events in certain locations far from campus was inextricably tied to the ability to pay for the buses, so there was some ambiguity about the mentoring dinner locations and the tours up until a few weeks before the conference began. There was also concern about what the weather would be like, since our experience with using buses for ICHORA in 2012 had proved that using them made the experience far more accessible and comfortable for everyone.

Lessons learned

If one's institution already does business with a particular transportation company, we recommend you use them since they are used to dealing with university contracts.

Have a designated point person for transportation. This person will be the on-site contact for the bus company, and may need to take/make calls with the bus coordinators and dispatch throughout the conference. She should also be the person to make sure the buses know where to load/unload, and to direct attendees where to go. The point person may need to check with campus police or campus parking and transportation about on-campus bus pick-ups.

Assume you will need lower capacity buses or fewer buses than the total number of attendees, even for "mandatory" events. We planned for 100% attendance, which was the safe thing to do, but we always had ample extra space (with a range from 50% to 80% actual attendance).

Time frame

We started inquiring about bus companies and costs in late March. Actual reservations were not made until late May—again easier to do because we had done business with this firm before.

Mentoring Matches: Lorrie Dong

Planning summary

The mentoring matches (not to be confused with the mentoring dinners) were actually almost forgotten, but we realized that the AERI application form had included the option to be a mentor or a mentee, along with a selection of topics that people might be interested in, to enable informal mentoring meet-ups, possibly during lunches. At the end of May, two people from the local committee went back to everyone's individual applications and see what people had selected.

A spreadsheet (see included spreadsheets) was created that indicated people's preferences. Some effort was made to group people by either mentor or mentee status, and their interests. About half of the registered faculty signed up to be mentors, and almost all the doctoral students signed up to be mentees. The majority of the latter wanted mentorship in how to get through the dissertation process. The junior faculty members who signed up to be mentees were interested in how to get tenure and career development. Then through a process of trial and error, and prior knowledge of individual faculty and student interests and personalities, each mentor was given three to four mentees.

A second spreadsheet was made that showed the mentor, his/her email, the mentees, and their emails; this spreadsheet was sent to all mentors and mentees in a group email, and mentors were instructed they were responsible for contacting their mentees and making appointments with them during AERI.

Lessons learned

Make sure to include people's mentor/mentee selections in your spreadsheet of AERI applicants and/or AERI attendees. We had forgotten to do this and it was a huge pain to go back and look at everyone's applications again. This process might be one to seek if it is decided to use meeting-management software.

Have both a faculty and a student member of the committee who are veteran AERI attendees look over the matches to ensure they are good fits.

Mentor matches work well in lengthy lunch breaks and other non-scheduled times.

Time frame

Even though the timing felt a bit "late" on making the mentoring matches, having the email sent out to mentors and mentees at the end of May (just a few weeks before AERI) worked out well.

Conference Bags: Katie Pierce Meyer, Lorrie Dong

Planning summary

The AERI Planning committee began discussing conference tote bags early in the Spring semester. As a group, we all decided we would like strong reusable bags, preferably cotton, not plastic. As a group, we discussed the colors we should use on bags, if we could afford two-tone printing, and which logos should be included.

Katie took on bag design and purchasing logistics in April 2013 and began researching various bag vendors, including ordering them online. Ann Seago recommended two local companies: Austin Screen Printing and Aztec, because (1) they know how to deal with the UT/iSchool logo copyright issue and (2) it would be easier to figure out how to pay them. Lorrie agreed to seek funding for bags, so that we could know how much we could spend, and she secured funding from the Dolph Briscoe Center for American History ($300). Lorrie and Katie spent an afternoon in early May looking at tote bag options online and contacted the two companies, which provided quotes on several bags. Once we selected one option that we liked, Lorrie secured additional funding from the School through Associate Dean Philip Doty, which covered the remainder of the bag costs ($4.08 per bag). Once funding was secured Lorrie ordered 115 bags and I began to focus on the design.

The key design features of the bag are the outline of Austin skyline, the new AERI logo designed by Sarah Kim, and acknowledgment of our funding sources. Austin's skyline has changed rapidly over the past 5-10 years, so finding an image to work from that would represent Austin and still look recognizable today was a challenge. Katie finally found several photographs that were taken from Congress Avenue, on the south side of the river, looking north towards downtown and the Capitol. The outline she created based on those images is a bit abstracted to show the Capitol building larger than it would actually appear. Ann Seago kindly lent her artistic talent to add the UT Tower in the background. The new AERI logo by Sarah Kim was inserted into the skyline design like a sun and we added "Austin 2013" to the bottom left side of the design. Sarah Kim helped edit the logos we got from the SI and the Briscoe Center. I created a new CHIPS logo. To identify our funding sources, I was initially charged by Pat to create a layout that represented the level of funding received. IMLS, as our largest funding source, was the most prominent, then the SI, the Briscoe Center, and finally, CHIPS. As you can read below, licensing issues with UT caused logo design changes, but also caused us to create a simpler, more streamlined design.

<u>Lessons learned</u>

We should have looked into all licensing requirements for the use of logos that included "The University of Texas at Austin." The most frustrating part of the bag design process came at the very end, when the Office of Trademark Licensing could not approve the IMLS logo appearing along with UT logos. According to a coordinator in the office, the IMLS Logo and SI, Briscoe Center, and CHIPS logos together imply co-branding, which is not allowed, per a University of Texas Regents' rule, unless the groups are equal contributors. Given that IMLS is our primary funding agent, we opted to include the following textual acknowledgement, as instructed on the IMLS logos website: “AERI is made possible by a grant from the U.S. Institute of Museum and Library Services.” By investigating the UT logo requirements earlier, we could have avoided a lot of time spent discussing and designing logo placement. In retrospect: we were happy with how the bags came out and satisfied that people will continue to find them useful, but we might advise the next venue to invite all veteran AERI attendees to bring their own AERI bag, as SAA has done in the past.

<u>Time frame</u>

We began to focus on tote bags in April 2013, when we had discussions about type, size, colors, and design in several weekly planning meetings. After looking into multiple online purchasing options, Ann Seago recommended two local companies on April 29.

Lorrie and Katie visited the Aztec Promotional Group and Austin Screen Printing websites and contacted each for quotes on May 9 and received several good options on May 10.

On May 14, we received notice that the lead time to have bags printed by Austin Screen Printing was 10 days, so we needed to have our design to them by May 27.

After feedback on the design from Pat, Sarah Kim, and Lorrie, I submitted the design on May 24.

On May 28, we received a copy of the order and licensing form, which Ann and Kamar dealt with.

On May 29, Ann asked for all individual artwork and logos, to forward to the UT Licensing/Trademark Office for approval.

We received a response on June 5, asking for clarification of IMLS involvement and on Friday, June 7 we were asked, by the UT Licensing/Trademark Office, to remove the IMLS logo. That day Katie made the changes described above to satisfy the Licensing/Trademark Office so that the bags could be approved by Monday, May 10 – the hard deadline for having the tote bags printed on time.

Katie received an email and phone call on June 11 to set up a time for a sample proof approval via email, which we arranged for June 12 at 8:30. She approved the proof on the morning of June 12 and the bags were printed that afternoon.

By far the biggest time setback was the UT Licensing/Trademark Office taking over a week to respond and decide we needed to make changes. Ann had to follow up to remind them about our request.

Promotional Materials for Tours (bag contents): Jane Gruning

Planning summary

Jane contacted repositories at which we were going to have tours about getting promotional materials from them to include in the conference bags and picked up materials from the repositories if there was not time to have them mailed. Additionally, she contacted the city tourism office and asked them for promotional materials; this was essentially the same process.

Lessons learned

The initial contact should be made earlier, as in our case one of the repositories had recently run out of their brochures and they were not able to get them reprinted in time for us to get them into the bags. An additional advantage to earlier contact is that having materials sent by mail will save you the time of traveling to the repositories to pick them up.

Time frame

Jane sent the initial email about two weeks before we needed to assemble the materials for the conference bags, but would advise starting sooner.

Poster Printing: Jane Gruning, Carlos Ovalle

Planning summary

Following UCLA's lead in 2012, we asked if our IT lab could print posters for people who sent in their poster files to us within the deadline, and we received support for the cost from the School. We had to check file sizes and make sure that the files were ready to print as 20"x30" size posters (Lorrie found that this was the standard poster board size). In our case, it was easiest to use Power Point files, as they are easier to re-size without loss of quality than PDF files. After picking up the printed posters, Jane cut them to the correct size on a large board cutter, and attached them to poster boards with putty.

Lessons learned

Make sure you base your poster printing size requirements on your poster plotter's ability AND the foam core you will be using (alternately, you could adhere posters to walls, etc.). Make sure to be very clear to poster presenters that they must format their posters AT SIZE so that you will have to do minimal or no alterations for them. The poster printing process will probably vary depending on what resources you have available (at UCLA, they were able to work with a print shop to print posters directly on boards, which was very nice and is a possibility worth investigating, but it is probably more expensive, and it lacks the advantage that poster presenters can remove their posters from the boards and take them home more conveniently. It is a good idea to investigate your options a couple of months before the conference so that you're aware of what you need from attendees who are presenting posters, and you can plan how much time you'll need to prepare posters. A week was fine for us once we had all the materials together, and Carlos Ovalle was able to have the printing done as a training exercise for a new group of lab assistants.

Time frame

Emails providing information to poster presenters about the expectations for their poster presentations (i.e., judging) and the dimensions for their posters were sent out a month before AERI. This is also when we told presenters that they could send their PPT and PDF files to us at least two weeks before the conference if they wanted us to print them out. Posters were printed, cut, and attached to boards the week before the conference.

Volunteers/registration desk: Ciaran Trace

Planning summary

Ciaran Trace undertook arrangements for the registration desk. The "registration" desk (actually serving both for registration and general troubleshooting and information for AERI participants) was staffed by volunteers from the SI, with at least one member of the AERI local arrangements committee always there to help out. A total of seven volunteers took it in turns to staff the desk from Sunday afternoon through Friday afternoon (volunteer hours were 8:30am to 12:30pm and 1:30pm to 5:30pm). The volunteers were mainly master's students who were interested in helping out and attending some of the sessions. Several weeks before the institute, a schedule was put together (and available at the desk) to track who was on duty every day. During the week the desk hours were 8am to 5:30pm (the AERI local arrangements committee did the table set up every morning before the volunteers arrived).

An information sheet was created for those on the registration desk, containing a list of all the material needed at the desk (see below), a list of what needed to be done each morning and evening (e.g. check meeting rooms, turn on projectors, put out bottled water for the speakers, be available on the desk to give out AERI bags/packets and to answer any questions from participants, meet caterers on site for morning breaks and help with setup if needed, etc.). Specific notes were also created for each day (as a reminder about special events, such as tours). Also included was a list of key contacts (with cell numbers), including volunteers, vendors, and members of the local arrangement committee and their area of responsibility (catering, accommodation, faculty dinner, general logistics etc).

The setup of the registration desk was only really time consuming on the first day (Sunday). A lot of material needed to be transported from the School of Information to the dorms, including material for the AERI desk (see below), IT equipment (projectors, laptops, cords, cables), easel pads, etc. Once at the dorms a dolly/movers cart was used to get all the material inside. The table itself was supplied by the dorm and the AERI banner was attached to the front. Every evening the material at the desk was gathered up and stored in one of the meeting rooms.

List of material for the AERI registration/information desk:

- List of key contact information (phone numbers of local arrangement committee members and what everyone was responsible for – accommodations, catering, tours, tech support etc).
- List of AERI participants (people were checked off when they received their AERI bags)
- Signup sheets for tours on Thursday and Friday
- List of mentors and mentees
- List of those participating in mentoring dinners
- AERI bags (including fans and name tags) to give out to participants
- Program and Program at a Glance
- Maps (dorm, conference center, campus, Austin)
- List of Austin restaurants
- List of Austin cab companies
- Local magazines (eating out, local attractions etc.)
- Supplies for meeting rooms – easel pads, markers, bottled water
- DIDN'T HAVE AT THE DESK BUT WISHED WE HAD – spare clickers for those giving PowerPoint presentations

<u>Lessons learned</u>

What we had not fully anticipated was the wide variety of questions that would be asked at the registration desk—everything from how to procure an iron, to where to print/fax documents. Since participants did not have access to a printer at the dorm, we had to improvise by making a couple of 'print runs' to the School of Information, as needed. We also learned that it would be helpful to have at least one person available at the desk who could transport people by car at short notice. This would allow for a quick trip back to the school to pick up equipment/supplies or to transport people with mobility issues around campus.

<u>Time frame</u>

Volunteers were recruited during May and details were worked out leading up to the day of arrival (June 16) and on the first day of the Institute as we found what worked well in practice.

Junior Faculty day: Ciaran Trace

<u>Planning summary</u>

Ciaran Trace, as the junior faculty member on the local arrangements committee, agreed to be in charge of Junior Faculty day, an idea that had come out of planning discussions among the Program Committee at the end of AERI 2012. All junior faculty who registered for AERI were polled before the event to see what kinds of activities they would like to see on the schedule. Responses were few and there was little agreement about what would be useful. The "senior juniors," in particular, were reluctant about adding a junior faculty day to the schedule, preferring that time be put aside at AERI for people to work on existing projects (writing, grading etc).

A formal program was put together for the day that attempted to accommodate all voiced needs. Because of the Student Day placement on Wednesday, we found that since no summer school classes were being taught on that day at the School of Information, we could have access to as many rooms as we needed at the School for no cost.

9am to 10:30am MANAGING YOUR ACADEMIC CAREER

- Cal Lee: *If it's a Marathon, Why Does it Feel Like a Sprint? Lessons and Strategies for an Academic Career*
- Joanne Evans: Building Blocks for a Successful Research Career
- Ciaran B. Trace: *Where Am I Going and Who Will Go With Me? The Why and How of Academic Collaboration*

10:45am to 12:15pm BUILDING COLLABORATIONS – AKA ACADEMIC SPEED DATING

Each person has five minutes to present

- Briefly discuss your current research or teaching program
- What time of collaborative project you are envisioning (grant proposal, research project, curriculum etc)
- What you could bring to the collaboration
- What you are looking for in a collaboration

12:15pm to 2pm LUNCH
2:00 pm to 3:30 pm INFORMAL BREAK OUT SESSIONS - Time to talk to potential collaborators **[iSchool]**
3:30pm to 5pm DISCUSSION OF THE FUTURE OF AERI

In the morning. three speakers talked about managing your career over the long term. While successful, this session did receive some criticism because some felt that it was overly focused on helping faculty at R1 institutions. The later morning/early afternoon sessions on academic speed dating got fewer participants (9 in total) but were quite successful in helping match people interested in working on collaborative projects. Again, senior juniors were reluctant to get involved in this part of junior faculty day as they felt they already had enough projects on the go. The last session of the day was set aside for the “Future of AERI talk” designed to encourage juniors to discuss matters that they would like to see raised in the closing “Future of AERI” plenary on Friday. Eighteen junior faculty showed up for that meeting.

<u>Lessons learned</u>

The Junior Faculty activities were variously useful to the extent that junior faculty experiences are beginning to parse out the differences that archival educators’ careers are beginning to show as there are more of us. We hope that the evaluation questionnaire will assist with better ideas of what to do for this group in the future. We did feel that for some people having a specific activity was more freeing than being compelled to pursue networking on their own—and more likely to lead to new experiences.

<u>Time frame</u>

The setup of the Junior Faculty activities were discussed from about March onward, but came together in late April and May.

Archives tours: Ciaran Trace

Tours of five local repositories were arranged for the Thursday afternoon of AERI (4pm to 5pm). Local repositories were chosen several months before the Institute and key contacts selected and emailed to arrange the tours. Each repository set their own limit on how many people they could have on the tour (in our case, between 15 and 20). Signup sheets for the tours were available at the AERI registration desk on the Monday and Tuesday and volunteers at the desk encouraged people to participate. We also included a handout/pamphlet on each repository as part of the AERI bag. The day before the tours we emailed the repositories to let them know how many people to expect. One person (either a member of the local arrangements committee or an AERI volunteer) was assigned to go with each tour group to make sure that people got there and back safely. The tour leader had a map and a list of the participants who had signed up for the tour. Four of the five tours were on campus and within easy walking distance. We bused people to the off-campus venue (State Archives). Thank you emails were sent to all the repositories following the tour.

On Friday afternoon a tour was available for those AERI participants departing later in the day or on Saturday. Dr. David Gracy gave a walking tour of the State Capitol and we bused people there and back. We had a signup sheet for the tour that closed on Tuesday afternoon. An issue we had not anticipated was the number of people who signed up for tours and then dropped out at the last minute. This was particularly true of the Friday tour, where only about half the people that had signed up for the tour actually went. The dropout rate is important to consider if you are booking transportation for the tours. It would also help to give the repositories a heads up that the final number is something of a moving target.

Lessons learned

Local archives are happy to host visitors from AERI if given enough lead time to keep a time slot free for the activity.

Time frame

Contacts were made in April and numbers were finalized on the day before the tours.

Conclusions

As AERI begins to mature, it is time for a formal infrastructure to be developed for it, including the entities that need to coordinate and the respective authority they have. As the management of AERI has evolved, working out individual instantiations of the event has been differentially difficult to the degree that the event has been held as a centrally managed event or as a contracted event. The current AERI social space includes:

Central AERI management (at UCLA): runs overall AERI website, sends out emails to the whole AERI community

Current site management: runs local arrangements, but also operates CFP, manages proposal reception and passes proposals along to Program Committee for evaluation, proposes program structure.

Program Committee: For the past two years, has consisted of PIs and previous and future host representatives—in short, representatives of the 8 institutions in the consortium.

AERI participant evaluation questionnaire: This has emerged as a quasi-formal tool, but without enough formality or preplanning to be as helpful as it could be. It may be more helpful to have the Program Committee formally review the post-AERI evaluation questionnaire, consider possibilities for the next iteration of AERI, and prepare a set of overall suggestions for the next iteration to be incorporated in the CFP.

The greatest difficulty we had was the complexity of negotiating the contract with the central site, which left us waiting from September to March for a formal budget. Some aspects of the meeting by their very nature cannot be formalized until just before it takes place, but others, the most costly, have to be negotiated long in advance. In the short term we need to act to streamline this process; any funding model that we consider going forward to perpetuate AERI needs to provide for each host to have independent access to funding—or to make AERI self-funding as ICHORA is. Our experience with the latter, where participants deal with their own lodging as well as transportation (once an event hotel has been negotiated) and where they pay a registration fee that actually covers each individual person's participation, while frantic as all such tasks are, was far less anxiety-producing, once we realized that the numbers would be adequate to support a worthwhile conference and we knew that the sum of the registration fees was the budget we had unless we could raise sponsorship money, but it was not constrained as to categories of spending (except by law and UT policies).

The value of a strong and willing local student committee cannot be overstressed. Having a sizeable group to handle the myriad tasks connected with the meeting makes it possible to parse them out if they are well-understood, which is why we have provided what may seem to be "too much information" in this report. We can also not say enough for the SI staff, which though small as befits a small school, is skilled and willing. We did not have anyone working with us full time, but people with relevant rolodexes were able to help us as needed with minor catering for the poster session, buses, printing, and bags. We appreciated this chance to use institutional memory to help with things we do not do every day.

It was also gratifying to see the difference that doing something as simple as lengthening the time for lunch made in terms of lively interaction among attendees. The surprise for us was how handy the small space of the Cypress Bend café turned out to be in that regard, which in effect lengthened that time even more because it was only steps away.

Bringing an AERI instantiation to fruition is definitely hard work, but worth the work as we see the connections reinforced year by year and even as we see AERI changing as participants begin to invest their own stakes in it. It was especially interesting to see how the "Future of AERI" ideas from three sets of participants converged, as well as the emergent demand for a serious conference opportunity. We look forward to seeing the next step be taken at Pittsburgh next year as we continue on this path, begun as far back as the 1990s with the affirmation of the value of the research degree in archival studies, to make a social world that can support and confirm the importance of this work.