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S t a n d a r d s
T D W G

TDWG Conference Guidelines:

**Considerations for Hosting and Organizing
the Annual TDWG Conference**

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The Purpose of this Document

The annual conference for Biodiversity Information Standards (TDWG) attracts ~150–250 delegates from a wide range of disciplines, organizations and countries. The conference supports the core mission of this organization by acting as an international forum for discussing the development of standards and promoting their use for the exchange of biological/biodiversity data. This document is designed to outline the key issues and processes to be considered by TDWG and potential hosts of annual conferences. This document also forms the basis for calls for Expressions of Interest for future annual conferences.

Delegates

TDWG conferences are international (official language of the conference is English) with most delegates from the USA, Europe and Australasia. TDWG encourages attendance from developing countries and each region is represented on the TDWG Executive Committee. Numbers of delegates since 2003 are shown in Table 1 below.

Conference Locations

In 2011 the TDWG Executive created a Time and Place Committee to establish processes, procedures and time frames for identifying future conference locations well in advance. The Committee is managed by a chair who is responsible for communicating with the Executive Committee. The chair is responsible for soliciting and identifying additional members to assist with the tasks of the Committee. Depending on the bids and locations of future TDWG conferences, additional members or observers can be added temporarily to the Committee as necessary. The aim is to make future planning much easier for delegates and to provide TDWG with a longer term conference outlook. Two documents have resulted from that process:

1. **Biodiversity Information Standards (TDWG) Time and Place Strategy 2012-2017.** This is a standalone document that should be viewed in conjunction with this document for conference planning purposes.
2. **Biodiversity Information Standards (TDWG): call for expressions of interest to host an annual conference in years 2013 to 2017.** This includes the Host Expression of Interest Template and is included in Appendix 1 of this document.

The location of TDWG conferences reflects the demography of its members. The annual conference tends to be held in the USA or Europe on average, two years out of three with the third year as 'elsewhere'. There have been attempts to address capacity-building in developing countries but experience suggests that gaining a critical mass of locals and engaging them in the meeting is not easy. The required computer infrastructure may also raise difficulties for potential hosts.

Ideally, the location of the conference will be near a significant air-transport hub. Examples include London, Madrid, Denver, St Louis, Sydney. If not, then a regular, reliable air, train or bus service should be available. Locations of recent meetings are listed in Table 1.

Table 1. Location of the TDWG conference from 1985, and where available, number of delegates attending.

Year	Location	Delgates
1985	Geneva, Switzerland	12
1986	Pittsburgh, Pennsylvania, USA	27
1987	Edinburgh, Scotland	
1988	St. Louis, Missouri, USA	
1989	Las Palmas, Gran Canaria	
1990	Delphi, Greece	
1991	Canberra, Australia	
1992	Xalapa, Mexico	
1993	Washington, DC, USA	
1994	Paris, France	
1995	Madrid, Spain	
1996	Toronto, Canada	
1997	Taipei, Taiwan	
1998	Reading, England	
1999	Cambridge, Massachusetts, USA	
2000	Frankfurt, Germany	95
2001	Sydney, Australia	
2002	Campinas, Brazil	
2003	Oeiras (near Lisbon), Portugal	91
2004	Christchurch, New Zealand	123
2005	St. Petersburg, Russia	123
2006	St. Louis, Missouri, USA	182
2007	Bratislava, Slovakia	141
2008	Fremantle, Australia	189
2009	Montpellier, France	277
2010	Woods Hole, Massachusetts, USA	228
2011	New Orleans, Louisiana, USA	233
2012	Beijing, China	90
2013	Florence, Italy	190
2014	Jönköping, Sweden	186
2015	Nairobi, Kenya	150

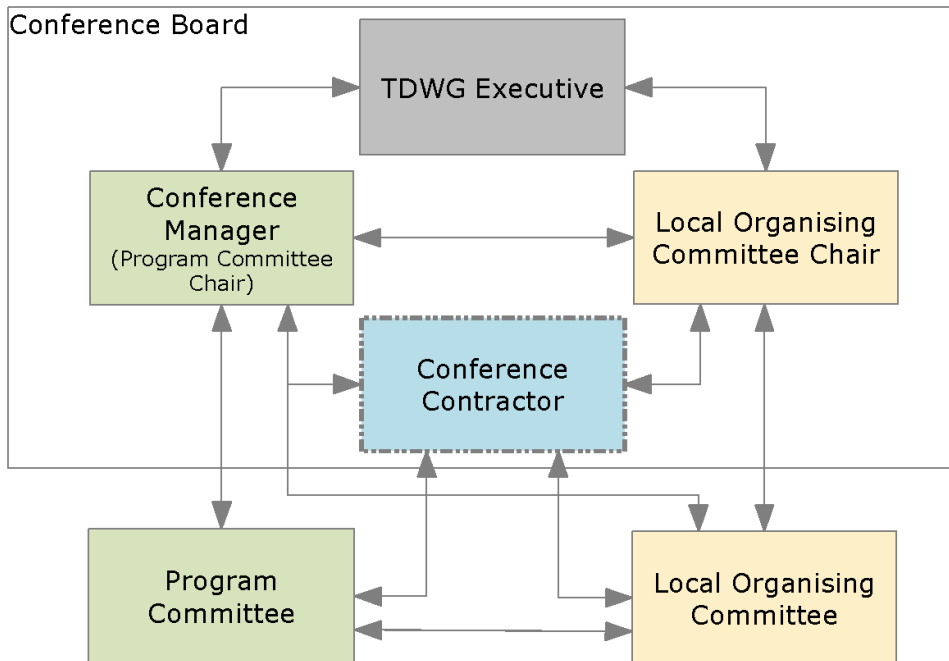
The key factors deciding the location of TDWG conferences in decreasing weight are:

1. Significant delegate base
2. Host organizations
3. North America, Europe, elsewhere cycle (refer to: Time and Place Strategy 2012-2017)
4. Low risk to TDWG (see Conference Budget highlight below)
5. Reasonable registration cost (TDWG conference registration costs have been traditionally lower than average due to not using commercial organizers – but TDWG is always open to alternative approaches)

6. Close proximity of accommodation, catering options and venue
7. Suitable and flexible venue
8. Outreach potential where a host can identify significant benefits for their country or region.

Conference Management

A Conference Board oversees all aspects of conference management.



The Conference Board is made up of:

1. TDWG Executive
2. Conference Manager
 - a. Who is also the Program Committee Chair
 - b. Who constitutes and chairs a Program Committee that includes:
 - i. TDWG Treasurer
 - ii. TDWG Secretary
 - iii. TDWG Website and Open Conference System (OCS) Manager
 - iv. Symposia organisers
 - v. Contributed presentations coordinator
 - vi. Mentors (year 3) and observers (year 1) - see below
 - vii. Others as required, including
 1. Member of LOC - *ex officio*
3. Local Organising Committee Chair
 - a. Who constitutes and chairs a Local Organising Committee that includes:
 - i. TDWG Treasurer
 - ii. TDWG Website and Open Conference System (OCS) Manager
 - iii. Mentors (year 3) and observers (year 1) - see below
 - iv. Others as required including

1. Conference Manager - *ex officio*
2. Member of the TDWG Executive Committee - *ex officio*
4. Conference Contractor– an optional position that would report to the Conference Manager operationally and to the TDWG Exec organizationally

The activities associated with the preparation and management of the annual conference are carried out by the Program and Local Organising Committees in conjunction with and under the guidance of the Conference Board. The Local Organizing Committee and the Program Committee should, where possible, operate on a 3-year cycle. At least a few of the committee members should:

1. Be **observers** on year 1
2. Be **organizers** on year 2
3. Be **mentors** on year 3

Committees and Responsibilities

TDWG Executive Committee. This committee has the ultimate responsibility for decisions on location and program theme, approval of the meeting budget and setting appropriate fees. This committee will:

- Identify a location for the conference
- In conjunction with the hosts appoint the Local Organising Committee Chair
- Appoint a Conference Manager who is also the Program Committee Chair and help recruit members of the Program Committee
- Suggest themes or priorities to the Program Committee
- Set the registration and banquet fees
- Approve the budget for the meeting
- Advise on all conference matters as required

The Conference Manager

The Conference Manager is the primary contact for the conference, ensuring that the conference organization remains on track. This document is the key guide for the Conference Manager.

Local Organizing Committee. This committee *manages the local organization* of the conference once a basic agreement has been reached. The composition of this committee is the responsibility of the hosts. The Conference Manager and a member of the Executive (for liaison with the Executive) must be *ex-officio*. One member of the Local Organizing Committee must be on the Program Committee.

Responsibilities include:

- Venue management (rooms, equipment, audio/visual support staff, coffee/tea, snacks, poster area and boards)
- Securing a site and sponsorship of the Welcome Reception held Sunday evening
- Promotion of the conference to local groups and media. Support can be expected by the TDWG Executive Committee and Program Committee
- Web content for transport, local area interests, food, accommodation, excursion options (possibilities for pre-, post-conference; mid-conference free afternoon), venue locations and layout

- Suggestions for keynote speakers to the Program Committee would be appreciated.
- Providing ~two people for peak registration times to assist the Treasurer with registrations and one person available at other times for day-registrations and to advise delegates with questions about local issues.

Program Committee. This committee is chosen by the Conference Manager in conjunction with the TDWG Executive Committee and is responsible for *defining the Program of the conference*. The Program Committee must have at least one member of the Local Organizing Committee and the Conference Manager *ex officio*. The committee is responsible for:

- Developing and integrating the conference themes for the meeting, which were proposed by the TDWG Executive Committee. These should be emphasized in the call for proposals.
- Soliciting symposium and workshop proposals from TDWG members (including time required, expected attendance, and other expected requirements), reviewing proposals received within 30 days of the submission deadline, and notifying organizers whether or not their proposals have been accepted for the program so that speakers may be invited.
- Outlining the conference program down to ¼ day session titles (90-minute) with Session Chairs/Leaders identified who have agreed to lead.
- Posting accepted symposia and workshop titles and abstracts on the conference website with names of session organisers within 45 days of the submission deadline.
- Identifying the need for, and timing of, contributed presentations such as posters, oral presentations, and computer demonstrations. Note that some presentations may fit into symposia and workshop topics and organizers might want to incorporate or highlight these presentations as part of their themes. Additionally, many delegates need to contribute presentations to obtain funding to attend conferences.
- Liaising with TDWG Interest and Task Group Conveners and other interested parties to ensure that their needs are met. Conveners need to be engaged early to ensure that most of their priorities can be incorporated into the program. This can include contributions to themes, invited speakers, workshops, group meetings, hackathons etc.
- Ensuring that the program fits within the parameters developed (often in parallel) by the Local Organizing Committee, and that it is integrated and balanced
- Identifying and recruiting 1-2 invited plenary speakers
- Establishing the requirements for posters and formal computer demonstrations (in 2013, computer demonstrations were scheduled at the ends of sessions with contributed oral presentations; *informal* computer demonstrations were not scheduled and could happen *ad hoc*).
- Establish the requirements for meeting rooms and equipment, break out rooms and parallel sessions.
- Previous online surveys should help guide the conference planning and management.:

Accommodation

It is estimated that a reasonable breakdown would be something along the lines-

Star	Rating	Delegates
2	Inexpensive	20%
3	Average	60%
4	Expensive	20%

Ideally, the accommodation options and the conference venue are in a conference centre or are closely located. A few good options with a range of prices are preferable to 20 options where delegates need to spend considerable time finding accommodations that suits their needs. The delegates will be used to finding and paying for accommodations online so the Local Organizing Committee (see below) must provide a short list of recommended options with links for the conference web site. The conference venue and at least one accommodation option must be accessible to those with disabilities.

Bed and breakfast, home-stay and shared apartments are acceptable, often representing good value and more cultural insights than a hotel chain.

The accommodation should have Internet access for those who will need to work out of conference hours.

Conference Budget

The budget is one of the most significant aspects of a bid proposal. The spreadsheet in Appendix 4 should make this a relatively straightforward task. There are a few important points about the conference budget:

- TDWG typically cannot be the contracting party in arranging facilities, goods, and services to support the conference. Therefore, the host accepts responsibility for all *non-refundable* costs in the event of cancellation or curtailment, to include (at least) venue space and facility rental, equipment costs including internet access, catering (at the venue) and banquet (if there is a cancellation penalty), transportation (including the banquet) and delegate packs. At the host's discretion, insurance can be arranged to protect the host against unrecoverable costs in the case of cancellation. Please note, however, that TDWG has never cancelled its conference, even in October of 2001.
- Once the budget is accepted by the TDWG Executive Committee, TDWG undertakes to cover all expenses outlined in the budget. Budget development by the host must be a realistic reflection of true costs, but may include an allowance of up to 5% for non-fixed costs. Once accepted by the TDWG Executive Committee, only costs up to the agreed upon budget total will be covered by TDWG. Any unforeseen expenses must be covered by the host. Allowance for up to 5% non-fixed costs can be included in the budget.
- The annual conference represents a significant part of TDWG's annual income. The TDWG Executive Committee is ultimately responsible for setting registration fees to ensure that a reasonable income is obtained to cover current and future expenses.
- A spreadsheet detailing income and costs must be provided to the TDWG Executive Committee with any hosting bid. Income will include sponsorship (see Appendix 2 for an example of a sponsorship letter), donations and an anticipated registration cost that will cover expenses.

The TDWG conference typically includes a banquet. The host is responsible for selecting the location and identifying the associated costs. The banquet is a delegate option (as are excursions), and therefore **need**

not be included in the budget. Banquet tickets and any banquet-specific sponsorship should cover the entire cost of the banquet. Income from general registration fees does not subsidize the banquet. The timing and location of the banquet should be considered in consultation with the Program Committee (see below).

We recommend that conference expenses be estimated in two components (see Appendix 4):

- Fixed costs such as venue, equipment, Internet etc;
- Per person costs such as transport, registration packs, catering costs, Internet access.

If particular expenses contain a base setup fee **and** a per person cost (e.g., Internet), these can be separated to enable projections to be modelled. 'In Kind' income/expenses should be noted for acknowledgement, but **should not** be included in the spreadsheet calculations.

A list of potential **income** items may include:

- Sponsorships
- Donations
- Registration. The registrations rates will ultimately be controlled by the TDWG Executive Committee but for budgeting purposes, the hosts will need to include an anticipated number of delegates and an amount that would cover expenses.

A list of potential **fixed expenses** may include:

- Venue/room hire/rental
- Wireless and wired Internet costs
- Equipment hire (laptops (for presentation & registration), projectors, laser pointers, timers, printer, sound systems and microphones, flip charts, white boards, poster boards, tables, chairs etc.)
- Salary for staff, including audio/visual support

A list of potential **per person costs** may include:

- Registration packs
- Catering (welcome reception and morning and afternoon coffee breaks; lunch)
- Internet access
- Transport costs
- Management or organization fees (these need to be explicit and must include US\$5 per person RegOnline costs if appropriate)
- Business Centre functions such as photocopying and printing

Internet Access

TDWG is an Information Technology-based group. All of its members are dependent on the Internet for their work and their involvement with TDWG itself. Delegates will expect simple and effective (wireless) access to the Internet at the annual conferences. This is no trivial task for 250+ people and should be carefully researched and tested.

Wired Internet access should be provided for presenters in plenary sessions, working sessions, and break-out groups. It is considered risky to put presenters and general participants on the same access system. While wireless systems are the most convenient, we recommend that the venue include a location where delegates can sit and access the Internet via wired connections, or wireless at acceptable browsing speeds.

Internet access will also be required in most if not all of the breakout or other meeting rooms (including the room for the TDWG Executive Committee. See below).

Timing of the Meeting

It is recommended that the conference be scheduled between **mid-September to mid-November** with the optimal time being around the second week in October. Earlier than mid-September and we have experienced difficulties in organizing the meeting with key people on holidays. Later than early November can present weather problems, getting cold in the northern latitudes and warm in southern.

Transport

As noted above, ideally, conferences should be located close to an air transport hub with simple onward transport to the accommodation and the venue. The simpler the transport arrangements are, the easier is the organization.

It is expedient that the location of most of the accommodations are within easy walking distance of the main venues. If this is not the case, we have found that transport can be costly and severely limit options for early arrivals and late departures from the venue. This in turn, can restrict *ad hoc* meetings and discussions. Most delegates also find that a walk to and from the venue is ideal, given that they are sitting for most of the day.

Meals and Snacks

TDWG delegates encompass the usual range of dietary requirements, likes and dislikes. Experience suggests that delegates prefer a wide range of food and drink options. Local food preferences are a highlight of travel. Ideally, there will be a range of options within walking distance of the venue and the accommodation. We provide all delegates with options for dietary restrictions at time of online registration.

All meals (except for the banquet night) are usually up to the delegates. Most delegates will seek out breakfast options at their accommodation or, commonly, on the way to the conference venue daily. Due to time constraints, lunch options should be at, or very close to, the conference venue and be able to accommodate delegate dietary requirements, preferences and variety during the meeting. No more than 20 minutes total walking time is suggested.

Delegates will require coffee, tea or a cold drink at morning and afternoon breaks. Light snacks should be provided for at least one of the breaks.

Registration

TDWG has found RegOnline (www.regonline.com) effective for handling conference registration for at least the past five years. RegOnline takes a small fixed fee/person for each registration (~US\$5). Significantly larger fees (5.5-6.5% of total registration fees) are imposed by the credit card companies. Note that this cost has been included in 'Management Expenses' in the spreadsheet (Appendix 3).

RegOnline provides the capability to record:

- Personal contact details
- Registration options including discounts and day rates
- Separate payment (second credit card) for the banquet
- Agenda choices. Options for presentations, posters and computer demos, attendance at various days, session options, dinners, excursions and any associated costs
- Dietary restrictions

- Merchandise choices such as t-shirts
- Badges
- Dissemination of conference information to all delegates via email
- Accommodation options. This feature has not normally been used but may be in the future if it is convenient.

Registered delegates are able to login to RegOnline at any point to change options or cancel their registration.

A registration desk usually needs to be staffed for most of the conference to act as an information point and to handle day-registrations, tickets for the banquet, excursions or merchandise. The registration desk requires reliable wired or wireless access to the Internet for at least two people on the first days of registration, a reliable printer, a white board for daily information, a pin board for notices and access to a telephone.

TDWG's Treasurer (treasurer@tdwg.org) manages the registration desk, but assistance from the Local Organizing Committee is also required.

The recommended approach is to have “two lines” – one for people who have pre-paid and just need to get their conference materials, and a second line for people who haven't paid yet. Paying by credit card at the meeting takes ~five minutes per transaction and is completely unnecessary, but some people are still reluctant to do online credit card transactions themselves.

On first days of registration (Sunday afternoon and Monday) two people are required to handle registration at peak times. After Monday (first actual meeting day), only one person is needed at the desk, preferably someone who has no interest in the meeting itself, like a local administrative assistant.

A printout should be made of the list of participants with their payment status, T-shirt size, and number of banquet tickets purchased. This enables local helpers to handle the packet distribution. They should confirm that people are paid up and marked as "attended", then provide the conference packets; otherwise send them to the second line where the Treasurer or other person running RegOnline transactions will take their payment and register them. At the end of a session, the sheet and recorded attendees should all be in RegOnline. Cash transactions should also be recorded in RegOnline, as well as “on paper”.

Last minute banquet purchases are very common and typically represent an important requirement for handling cash transactions. The Local Organizing Committee and Program Committee can request a data export of relevant details from RegOnline at any point. Access to RegOnline may be granted to individuals from these committees on request to the Treasurer or the TDWG Executive Committee (xcom@tdwg.org).

Venues

Meeting Rooms

All conferences will require a hall/theatre suitable for seating all delegates at plenary sessions. TDWG conferences always include some proportion of group meetings and break-out parallel sessions. The conference may require 3–6 additional breakout rooms that can accommodate 60–80 participants (one

room can be sized for 35–50). Additional space for posters is also required, preferably co-located in or near the break area so that participants may view posters while enjoying refreshments each day.

The final number and timing of use of rooms will be determined by the Program Committee in conjunction with the Local Organizing Committee. The Program Committee should be appointed as early as possible so that venue requirements can be established.

A room that can be used by the TDWG Executive Committee (with tables and chairs in a U-shape for a minimum of 20 people) should be available during the conference. This room should have a single high-speed wired access as well as access to high speed wireless Internet connections, a white board or flip chart, and power strips. The room can be used by the organizers for meetings when not being used by the TDWG Executive Committee.

TDWG conferences will usually require a mix of plenary sessions (with seating for all participants in a single room) and parallel sessions (as many as six simultaneous symposia, workshops, contributed presentations, and working group meetings). It simplifies the venue planning and costs if plenary space does not need to be broken up for smaller sessions, but this may not always be possible. In any case, when situating parallel sessions adjacent to one another, care needs to be taken to ensure sound system noise from competing sessions does not become an issue.

Equipment

The plenary venue will require a laptop computer (with a current version of Microsoft Office, Acrobat Reader, and modern internet browser) connected to a high quality computer display projector, large screen (or screens, depending on the room configuration), microphone, podium, one or two roving microphones, and a wired Internet connection. The ability to add our own licensed recording software to presentation computers is also requested. Power boards/strips must be supplied to at least 20% of the seats in the plenary venue. Breakout and other meeting rooms will also require a table with a laptop computer configured similarly to the plenary venue, connected to a projector, with a large screen, wired (preferred for the presentation computer) and wireless internet connections, additional power strips and may require a white board or flip chart.

Posters and informal computer demonstrations (concurrent with coffee breaks or other arrangements) are a traditional component of TDWG conferences. The Program Committee is responsible for communicating all venue requirements from the conference program to the Local Organizing Committee. The Local Organizing Committee will need to specify constraints on the availability of equipment, poster boards (including size of posters accommodated and whether local facilities are available for printing posters for participants and at what cost), meeting spaces, etc. to the Program Committee as early as possible in the planning process.

Morning and Afternoon Breaks

An area of sufficient size is required to accommodate all delegates for morning and afternoon coffee/tea breaks. Much productive discussion at the conference happens informally. Access to areas where delegates can have effective discussions is important. Some tables and additional seating in this area would be valued. A mechanism to signal the end of breaks and beginning of sessions is also highly desirable.

There is often limited time dedicated to poster and informal computer demonstrations. The areas for morning and afternoon breaks should therefore have ready access to poster and informal computer demonstrations rooms (preferable) or common areas.

Poster Area

TDWG encourages the submission of posters at annual conferences. Posters should be hung for most of the conference. Up to ~60 posters can be anticipated with most A0 size (see http://en.wikipedia.org/wiki/ISO_216), depending on the available room or size of the panels other formats can also be envisaged (i.e. A1). It should also be assumed that the area for posters will accommodate most of the delegates during any poster-only periods. An estimate of the number of posters to be displayed will be available from the RegOnline (see Registration). **All presentations including posters, contributed oral presentations, and formal computer demonstrations require the submission and approval of an abstract.**

Computer Demonstrations and Contributed Oral Presentations

A distinction is made between formal and informal computer demonstrations. Informal demonstrations will not require an abstract nor be featured in the program. They will be arranged on an *ad hoc* basis, and space will be provided near the posters with tables and a limited number of wired internet connections (this space may also be used for workshops hosting a "software bazaar" (multiple simultaneous demos) as part of their program).

Formal computer demonstrations are treated the same as contributed oral presentations (not part of symposia or workshops) and are scheduled in parallel sessions throughout the meeting. In 2013, six such sessions were scheduled, putting the computer demos at the end of each session because presenters often used their own equipment.

Web Site

A Home page for the annual conference will be established on the TDWG web site, with the logo included when it is available. The Conference Manager is responsible for developing the logo in partnership with the LOC. **The Local Organizing Committee is responsible for providing the following content** for the web site in a timely manner:

1. Recommended and detailed travel arrangements including any special requirements such as visas
2. Accommodation options, accessibility issues (if any), locations and costs
3. Maps of venue location, facilities and floor plan
4. Climate details and/or what would be best to wear
5. Any local customs or sensitivities such as dress code
6. An outline of recommended dinner options and approximate costs
7. Banquet details including maps to location, menu, any transport and costs
8. A few excursion/tour options, locations, transport and associated costs. Excursions are optional and may, if organized, be listed at the online registration site.
9. An outline (links or summaries) of local 'things to see and do', history, demographics, etc. would be greatly appreciated. This is an opportunity to promote your country and region so please consult with local tourist information for suggestions. Photographs are especially encouraged.

Conference Program

The conference program is largely the responsibility of the Program Committee with input and final sign-off by the TDWG Executive Committee.

The Executive Committee will provide the Program Committee with an outline of the ideas for the annual conference. It is the Program Committee's responsibility to develop and amend these ideas into a draft program.

Abstracts for all presentations (including workshops without formal presentations, Interest and Task Group meetings, as well as introductions and discussion sessions) need to be submitted to the Open Conference System (OCS) at the Missouri Botanical Garden. This will allow automatic posting of approved abstracts (and any subsequent changes), organization of the program by date and time, as well as by session. Each presentation will have its own identifier and should have a unique title and abstract appropriate to the presentation category for which it is being submitted. The OCS also permits posting of announcements for changes to the program.

Production of a PDF version of the program, which can be downloaded to mobile devices or and pages printed on demand, makes access to the program easier when internet access is problematic, but changes to the schedule are not reflected readily.

Printed versions of both the program and the attendee list should be provided to all attendees as part of registration, acknowledging that there may be changes made to the program which will not be reflected in the printed document but will be provided in the online version.

Session Chairs

Session Chairs, volunteer or recruited by the Program Committee, are usually responsible for one quarter-day sessions. Session Chairs are responsible for seeking presentations that they think will communicate effectively to the delegates and should seek geographical diversity where possible. Delegates are also encouraged to approach Session Chairs if they think that they can provide a quality presentation for the session. Such a 'two-way' street usually works effectively. The Session Chairs would also value any recommendations from the Program Committee.

Session Chairs are responsible for making sure that abstracts for their session are submitted by authors to the OCS, for reviewing and accepting the abstracts in OCS before they are posted online, and for providing the order and timing for presentations in their sessions. A member or members of the Program Committee may be assigned to act as session chairs for posters, computer demos, and contributed oral presentations.

Promotion of the Conference

It is in the interest of TDWG and the host to promote the conference as widely as possible. TDWG will work with the Local Organizing Committee to develop ideas and materials that could be used to promote the conference and the host's work (see Appendix 2 and 3). The TDWG Executive Committee and Program Committee will identify people who could be effective in communicating the significance of TDWG and its activities to relevant media. Please contact the TDWG or Program Chairs for further details.

An example Press Release from the 2008 conference can be found in the Appendix 3.

Appendices

Appendix 1: Biodiversity Information Standards (TDWG): call for expressions of interest to host an annual conference in years 2018 to 2021

The *Biodiversity Information Standards (TDWG), Time and Place Committee* is seeking expressions of interest to host its annual conference within the broader schedule given below. Note that the locations listed are only indicative with the aim to achieve a balance here for the participants and local hosts. Bids from other regions as those listed hereunder are thus accepted for evaluation every year.

2017 Canada (accepted!)

2018 Elsewhere

2019 Europe or North America

2020 Elsewhere

2021 Europe or North America

To better understand the facilities and services needed to support an effective meeting, please refer to Biodiversity Information Standards (TDWG) Conference Guidelines: Considerations for Hosting and Organising the Annual TDWG Conference. Co-located events with other organizations (e.g., GBIF, SPNCH, RDA) sharing TDWG interests or goals will also be considered, as well as opportunities for training, capacity building, and/or outreach. To submit a formal expression of interest please use the *Biodiversity Information Standards (TDWG) Conference Host Expression of Interest* form to the Chair of the Time and Place Committee. Proposals will be evaluated according to the following schedule.

Expressions of Interest and Full Proposal Indicative Schedule

- The call for expressions of interest open on January 31st of the year prior to the year of hosting.
- The call will close on May 30th the year prior to hosting.
- Where more than one submission is received, the Executive will work with applicants to determine the successful submission by July 30th the year prior to hosting.
- The successful host(s) for the next year's meeting will be expected to present their Full Proposal at the current year's conference for review and discussion by the Executive.
- The hosts for the meeting to be held the following year will be expected to make a presentation to delegates attending the current year's conference, building momentum and excitement for the upcoming venue.

Note that this schedule can be adapted to special local requirements or contains due to a joint organization with another event. The Time and Place Committee, assisted by the Secretary and the TDWG Executive will continue soliciting interest and expressions of interest in hosting of future meetings. When potential hosts are identified in advance of the above timetable, they will be asked to submit a formal expression of interest in pursuit of establishing plans for hosting ahead of schedule.

Biodiversity Information Standards (TDWG) Conference

Host Expression of Interest Template

To assert a potential host's credentials, capacity and interest in hosting a Biodiversity Informatics Standards (TDWG) conference, an Expression of Interest is required, addressing the following issues. As this is the first stage of the process of establishing a host for a particular year, expressions are expected to be brief but explicit. The successful applicant will be required to develop a detailed full proposal for presentation to the Executive at or before the TDWG Annual Meeting preceding the hosting year.

1. **Budgetary strategy.** No real detail of the budget is required at this stage; however, the approach to hosting the conference and the resultant budgetary implications are required.
2. **Conference hosting options:**
 - a. **Venue Options**
 - Name/Location
 - Overall space
 - Meeting rooms (number, capacity, conference vs. theatre)
 - Tech support (internet connections, type (wired + WiFi), bandwidth, audio/video support)
 - Conference dinner/AM and PM breaks/welcome reception options
 - A general indication of the Budget implications of this venue
 - Will the meeting and accommodations be in the same or different locations?
If different locations, describe the transportation arrangements anticipated.
 - b. **Accommodations (provide range of options)**
 - Name/Location(s):
 - Number of rooms
 - Distance from the conference site
 - Cost range of rooms, including group rate options
 - Accessibility issues (if any)
 - c. **Meal Options**
 - Local dinner options (including approximate distances from venue and costs)
 - Proposed venue for Welcome Reception
 - Proposed venue for TDWG Banquet
 - Breakfast options
 - Lunch options
 - d. **Transportation:**
 - Airlines servicing local airport
 - Access options (distance, cost, time) from airport to conference site
 - Local transport options at conference venue
3. **Key attributes of the location and potential venues:** Dot (bullet) points describing the advantages of the location and potential activities for attendees.
4. **Date options for the conference:** The preferred time for the conference is between mid-September to mid-November with the optimal time being around the second week in October. Climate may be a mitigating factor.
5. **Primary contact name and contact information:** Preliminary list of names of members of the Local Organizing Committee and their responsibilities.

B i o d i v e r s i t y
I n f o r m a t i o n
S t a n d a r d s
T D W G

TDWG 2008

**Western Australian Maritime Museum
Fremantle, Western Australia**

October 19-24, 2008

Biodiversity Information Standards (TDWG) is holding its international meeting this year in Fremantle. TDWG is the premier international organization developing standards for the exchange of biodiversity information on the Internet.

Who Attends TDWG Conferences?

TDWG Conferences attract an extremely broad range of people who deal in some way with biological/biodiversity information. It is traditional to have IT staff and managers, taxonomists and museum curators, librarians, Internet experts and key management and staff of international and national projects that share biological information. Organizations represented include government departments, consultants, universities, international and national projects and industry.

The key feature of TDWG conferences is the broad cross-section of information providers, aggregators, indexers, IT experts and end-users.

The Meeting

There are twenty sessions over five days with each session covering one theme. Monday 20th October has been planned as an introductory day. The intent is to cover the key aspects of the context for TDWG and international biodiversity informatics-related projects.

This year, the symposium will be on the Atlas of Living Australia project will take over Wednesday 2nd October. This promises to be a practical day where standards and users come together. Two tutorial sessions will be held to help people better understand key TDWG products. Sessions 8 and 13 will repeat three tutorials on TDWG foundational architecture, the TAPIR transport protocol and the NCD (collections-level standard) toolkit.

Further information can be found at <http://www.tdwg.org/conference2008/>.

Sponsorship

We anticipate 150+ delegates attending the conference in Fremantle. Sponsors have the opportunity to reach a broad international audience through these delegates. Sponsors have the opportunity to have their sponsorship promoted in various ways.

	Gold	Silver	Bronze
	\$6,000	\$3,000	\$1,000
Acknowledgement with logo on conference web site	✓	✓	✓
Acknowledgement with logo on abstract book	✓	✓	
Exhibition space (in order of sponsorship level)	✓	✓	✓
Company banner /logo displayed in venue (level dependent)	✓	✓	✓
Acknowledgement at opening/closing conference	✓		
Promotional material included in registration package	✓	✓	
Complementary registration for up to 3 delegates	✓		
Complementary registration for up to 2 delegates		✓	
Acknowledgement at opening/closing one session (of choice)		✓	✓
Complementary registration for 1 delegate			✓

Appendix 3: Example of a Press Release for the TDWG Annual Conference

N.B. This is an example only, and while some information may be reused or repurposed, each meeting would need updated Key Points of Contact, Key Talking Points, as well as venue and date.



**International Union for
Biological Sciences
Biodiversity Information Standards
(TDWG)**
<http://www.tdwg.org>

Example Press Release

Experts from leading museums and other biological research institutions throughout the world will gather in Fremantle October 19-25 to discuss ways to improve public and scientific access to knowledge about the living world.

The international Biodiversity Information Standards body is responsible for developing global Internet standards that allow information on biological species, specimens, and observations to be discovered, shared, and combined over the Internet. These standards enable the public, government departments, primary industries, consultants and scientists to access biological information for evaluating areas such as climate change, conservation management and sustainability.

Museums and other natural history collections around the world have already made available over 150 million records of specimens of plants and animals collected over hundreds of years. However, many millions of photographs and biological observations remain invisible. Most of this information is stored in books, on specimen cards, or in databases that aren't accessible to the public on the internet.

The meeting will address ways to find, digitize and link all biological information sources together. The results will benefit an extremely wide audience by greatly improving our understanding of how the living world will respond to challenges such as climate change and invasive species.

Key international projects such as the Global Biodiversity Information Facility and the Encyclopedia of Life will present their latest work and their plans for the future.

The Atlas of Living Australia project will be showcased at the meeting. This is a \$35 million project to unlock and make available the estimated \$1 billion worth of biological information held by Australian natural history collections.

Appendix 4: Example Budget

Version Date

20XX TDWG Meeting Budget XX October - YY November

		Planned Attendance:		Total: 200		Local:		0		International: 200	
No.	Items	Description	Details	Unit Price w/VAT	Amount	Price (Euro)	Price + VAT 2% 10%	2013 Cost (\$US)	Banquet Cost		
Fixed Expenses											
1	Venue Rental	Setup of all rooms	Sunday	490	1	490	593	\$775			
		Plenary meeting hall for 290 people	Monday through noon Friday	1340	5	6700	8107	\$10,598			
		4 breakout rooms: 55, 35, 30, 10	Monday through noon Friday	1140	5	5700	6897	\$9,016			
		Poster, Computer, Coffee Room	Monday through noon Friday	940	5	4700	5687	\$7,435			
		Registration table		0	1	0	0	\$0			
					Subtotal	17590	21284	\$27,824			
2	Equipments Rental	2 Laptops		104	5	520	629	\$823			
		2 PCs + Printer at Registration		128	5	640	774	\$1,012			
		Poster Boards	30, double sided	224	5	1120	1355	\$1,772			
		Technician		300	5	1500	1815	\$2,373			
		Electrical sockets in plenary		75	5	375	454	\$592			
					Subtotal	4155	5028	\$6,572			
3	Congress Management	Conference Manager	6 days	250	6	1500	1815	\$2,373			
		Assistants	2 people, 5 days	442	5	2210	2674	\$3,496			
						Subtotal	3710	4489	\$5,869		
4	Main Venue Decoration	Basic signage	Registration desk, plenary room, breakout rooms, poster & computer demo, restaurant	1000	1	1000	1210	\$1,582			
					Subtotal	1000	1210	\$1,582			
5	Security	Reception Security		850	1	850	1029	\$1,345			
						Subtotal	850	1029	\$1,345		
6	Hotel Room	Double Room	7 nights for 3 officers - Rainer, Mergen, Miller	122.73	21	2577.33	2835	\$3,706			
		City Tax		4	21	84	84				
						Subtotal	2661	2919	\$3,816		
Subtotal Fixed Expenses						23966	25368	\$47,007			
Variable Expenses											
7	Management fee	Not including RegOnline's US\$5 pp registration fee	RegOnline will be managed by TDW G Treasurer	5	200	1000	1210	\$1,582			
					Subtotal	1000	1210	\$6,327			
8	Conference Pack	Complete Bag	Cotton bag with logo, badge, lanyard, pen, note pad, cotton t-shirt printed one color, gadget	20	200	4000	4840	\$6,327			
					Subtotal	4000	4840	\$6,327			
9	Coffee Breaks	Morning and afternoon coffee break - No afternoon coffee break on Friday	9 coffee breaks @ 6.90 euro	6.9	1800	12420	13662	\$17,850			
		Bottled water - No bottled water to be provided	1 euro per bottle - excluded	1	0	0	0	\$0			
						Subtotal	12420	13662	\$17,860		
10	Meals	Welcome Cocktail	Reception with cocktail	30	150	4500	4950	\$6,471			
		Light Buffet Lunch	Lunch on Mon-Fri	24	1000	24000	26400	\$34,512			
						Subtotal	28500	31350	\$34,512		
11	Misc	No photocopying, telephone or fax paid by conference	These services will be paid by delegates if used	1000	0	0	0	\$0			
Subtotal Variable Expenses						45320	51062	\$66,752			
12	Banquet	Paid separately by delegates	Assume 80% attendance	0	160	0	0		\$0		
		Conversion Euro to Dollar				TOTAL:	75,886.33 €	87,020.11 €	\$102,128	\$0	
		1.30728				Estimated Attendance:	200	200	200	160	
						Average per person:	379 €	435 €	\$511	\$0	

Appendix 5: A checklist of tasks

Item	Task	Responsible	Start no later	Deadline
	Solicit Expressions of Interest for meetings	T&PC	Jan 31 3-2YB4	Jan 31 YB4
	Solicit proposals for meeting venue	T&PC, Sec'y	Jan 31 YB4	Feb 28 YB4
	Time & Place Committee reviews proposals & presents options to TDWG Exec for decision	T&PC, Exec	March 1 YB4	March 31 YB4
	Confirm successful proposal, establish Local Organizing Committee (LOC) & invite full proposal with budget due to TDWG Exec for approval.	T&PC, Exec	April 1 YB4	Jun 30 YB4
	Invite LOC Chair and/or CC of next year's A.M. to current year's A.M. with instructions to present on meeting location and venue at Exec and business meeting.	T&PC, Chair	Jun 30 YB4	July 31 YB4
	Budget revised, reviewed, registration (full, daily, subsidized) & banquet fees agreed upon, and final budget approved	Chair, Treas., LOC, CC, Exec	Aug 1 YB4	A.M. Exec YB4
	Negotiate contracts with Conference Contractor, hotel, catering, other services as required.	Chair, Treas, LOC, CC, Exec	Aug 1 YB4	Dec 31 YB4
	Sign contracts with Conference Contractor, hotel, catering, other services as required.	Chair	Sep 1 YB4	Dec 31 YB4
	Make first payments to Conference Contractor, hotel, catering, other services as required.	Treas	After contracts signed	Mar 31 YOF
	Decide on Meeting theme for next year's meeting	Exec	A.M. Exec YB4	Dec 1 YB4
	Appoint Program Chair	Exec	A.M. Exec YB4	Dec 1 YB4
	Send out meeting survey for current A.M.	CM (YOF); Sec'y	Nov 15 YB4	Dec 7 YB4
	Assemble full Program Committee	CM	Dec 1 YB4	Dec 15 YB4
	Report results of meeting survey for purposes of planning and possible future promotion quotes	CM (YOF)	Dec 15 YB4	Dec 31 YB4
	Meeting logo created and agreed upon	CM, Exec, LOC	Dec 15 YB4	Dec 31 YB4
	Develop outreach list for potential meeting/event/gift bag sponsors, meeting announcements (listserves), press releases, and distribute responsibilities for making contacts	CM, Exec, LOC	Dec 15 YB4	Feb 1 YOF
	Prepare OCS and conference website for content submission and output by date/time and by session/date/time	Web/OCS	Dec 15 YB4	Dec 31 YB4

	Issue call for symposia and workshops, including call for keynote speakers	CM, Sec'y	Dec 15 YB4	Jan 31 YOF
	Reminders sent out for symposia/workshop proposals	Sec'y	Jan 15 YOF	Jan 22 YOF
	Evaluate symposia and workshop proposals & notify successful bids	PC, CM	Feb 1 YOF	Feb 15 YOF
	Create initial conference website	Web/OCS	Feb 1 YOF	Feb 15 YOF
	Contact and obtain Plenary Speakers.	Exec, CM, LOC	Feb 15 YOF	Feb 28 YOF
	Post successful symposia and workshop proposal titles and abstracts on conference website	Web/OCS	Feb 15 YOF	Feb 28 YOF
	Post venue highlights, accommodation possibilities, & travel information for meeting	LOC, Web/OCS	Feb 15 YOF	Feb 28 YOF
	Site visit (if possible, timing dependent on schedules and weather) to the meeting venue to verify room sizes, facilities, technical/internet needs, dining facilities, hotels, banquet venue. Provide report to Exec, CM, and PC	CM or other Exec member	Feb 15 YOF	May 31 YOF
	First major announcement of meeting theme, broad content, venue highlights, website to TDWG and related lists	CM, Sec'y, Web/OCS	March 1 YOF	March 15 YOF
	Joint conference call with TDWG Exec; decide how/if elections will be incorporated into A.M. program	Exec, Chair, CM, LOC Chair	March 1 YOF	March 31 YOF
	Call for abstracts for contributed presentations (oral, computer, poster) (may be combined with task above)	CM, Sec'y, Web/OCS	March 1 YOF	May 31 YOF
	Call for abstracts for symposia presentations	Conveners	March 1 YOF	May 31 YOF
	Contact TDWG Interest & Task Group Conveners about reserving program time/space for meetings during A.M.	Sec'y, CM	March 1 YOF	May 31 YOF
	Prepare and test RegOnline for registration; include t-shirt size (if appropriate)	Treas., CM	March 1 YOF	March 15 YOF
	Early registration begins (announce with mid-March update)	Sec'y, Treas.	March 15 YOF	2 months prior to A.M.
	Monthly meeting updates and deadline reminders on TDWG and related lists	CM, CC, LOC, Sec'y	March 10 YOF	Tuesday mid-March YOF
	Monthly meeting updates and deadline reminders TDWG and related lists	CM, CC, LOC, Sec'y	April 10 YOF	Tuesday mid-April YOF
	Monthly meeting updates and deadline reminders TDWG and	CM, CC, LOC, Sec'y	May 10 YOF	Tuesday mid-

	related lists			May YOF
	Firm up potential optional excursions (pre-, post-, during) and post on website; decide & post deadlines for registering for excursions and provide link for registering/payment	CC, LOC, Web/OCS, CM	May 15 YOF	June 15 YOF
	Make intermediate payments to Conference Contractor, hotel, catering, or other services as required.	Treas	May 1 YOF	July 31 YOF
	Review abstracts, finalize Interest & Task Group meetings, finalize schedule for other events (election coverage, Interest/Task Group reporting, opening ceremony, closing ceremony, breaks, 1/2 day free, banquet, Exec Meetings, etc.) and create program schedule for upcoming meeting	Conveners, PC, CM, with Web/OCS	June 1 YOF	July 15 YOF
	Join conference call with TDWG Exec	CM, CC, LOC, Chair, Exec	July 1 YOF	July 31 YOF
	Post detailed program on website, including recognition of sponsors	PCC, PC, CM, Web/OCS	July 16 YOF	July 31 YOF
	Begin sending Letters of Invitation on request for attendees applying for visas	Sec'y	July 1 YOF	2 weeks before A.M.
	Monthly meeting updates and deadline reminders TDWG and related lists	CM, CC, LOC, Sec'y	June 10 YOF	Tuesday mid-June YOF
	Monthly meeting updates and deadline reminders TDWG and related lists, including links to guidelines for preparing presentations	CM, CC, LOC, Sec'y	July 10 YOF	Tuesday mid-July YOF
	Regular registration begins	Sec'y, Treas.	2 months prior to start of A.M.	1 month prior to start of A.M.
	Monthly meeting updates and deadline reminders TDWG and related lists	CM, CC, LOC, Sec'y	August 10 YOF	Tuesday mid-August YOF
	Decide on estimated attendance for meeting for finalizing per person items on budget	Chair, CM, LOC, Treas.	A.M. start minus 1 month	iterative until A.M.
	Decide on acknowledgements for outgoing TDWG Exec members, CM, PC, and LOC (others?), and arrange for obtaining/shipping as necessary	Treas., Chair, Sec'y, CM, LOC (as appropriate)	A.M. start minus 1 month	Banquet and/or Closing Ceremony
	Designate persons to meet and greet Plenary Speakers at the	Chair, Exec	A.M. start	A.M. start

	A.M.		minus 1 month	minuse 1 week
	Late registration begins	Sec'y, Treas.	A.M. start minus 1 month	end of A.M.
	Make final payments to Conference Contractor, hotel, catering or other services as required.	Treas	Sept 1 YOF	Start of A.M.
	Monthly meeting updates and deadline reminders TDWG and related lists	CM, CC, LOC, Sec'y	Sept 10 YOF	Tuesday mid-Sept YOF
	Monthly meeting updates and deadline reminders TDWG and related lists (if applicable)	CM, CC, LOC, Sec'y	Oct 10 YOF	Tuesday mid-October YOF
	Prepare and schedule press releases for/from meeting	CM, LOC, Sec'y, Chair, Exec	A.M. start minus 2 weeks	end of A.M.
	Provide access to printable list of pre-registered participants (must be registered to obtain) and email link to each registered participant (through RegOnline)	Treas.	A.M. start minus 1 week	end of A.M.
	Prepare conference bags & badges, printed program (if required)	CC, LOC	prior to registration	1500 h Sunday of A.M.
	Meet with IT support and LOC before meeting begins to confirm logistics	CM, CC, LOC	Friday before A.M. begins	Sunday morning
	Create slide upload site & instructions for presenters	CM, Web/OCS	Before A.M.	Start of A.M.
	Meet and greet Plenary Speakers	Designated persons	Arrival of speaker	Arrival of speaker
	Prepare registration desk and space for Treasurer	CM, CC, LOC, Treas	Day before A.M. begins	Day before A.M. begins
	Executive Committee meeting	Exec, CM, CC, LOC	Day before A.M. begins	Day before A.M. begins
	Post updates to meeting (cancellations, additions, etc.) on OCS	CM, LOC, Web/OCS	as needed	as needed
	Business meeting. Chair report. Elections report. Treasurer's report. Announce PC for next A.M.	Chair, Treas, Sec'y	During A.M.	End of A.M.
	Present information about the next A.M.	CC, LOC for next A.M.	During A.M.	End of A.M.
	Executive Committee meeting. Post mortem of meeting:	CM, CC, LOC,	iterative	Friday or last

	impressions of what worked and what can be improved for next year. Document lessons learned.	Web/OCS, Treas., Sec'y, Exec		day of A.M.
	Construct meeting survey	CM, LOC, Exec	15 d post-A.M.	open 15 d
	Summary of A.M. to members	Chair (w/CM & Exec)	15 d post-A.M.	1 month post
	Advise new PC and CM in year following A.M.	CM	immediately	Never ending

abbreviations:

A.M. = Annual Meeting (mid-September to mid-November)

Chair = TDWG Chair in year of meeting

CM = Conference Manager/Program Committee Chair

CC = Conference Contractor (if contracted conference manager is used for the meeting)

CM (YOF) = Conference Manager of Annual Meeting just held (dates are indicated as YB4 as these tasks will be necessary for CM)

Conveners = Symposium & Workshop Organisers

Exec = TDWG Executive Committee

LOC = Local Organizing Committee

PC = Program Committee

PCC = Program Committee Chair/Conference Manager

Sec'y = TDWG Secretary

T&PC = Time and Place Committee

Treas = TDWG Treasurer

Web/OCS = TDWG Website and Open Conference System (OCS) Manager

YB4 = Calendar year preceding that of the meeting

YOF = Calendar year in which meeting takes place