



TRAINING SCIENTISTS TO MAKE THE RIGHT MOVES

**A Practical Guide to Developing Programs
in Scientific Management**

**Burroughs Wellcome Fund
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Chapter 3

DECIDING WHAT, WHEN, AND WHERE

In This Chapter

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Big-Picture Considerations

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Existing Event

Now that you have obtained buy-in from your organization's leadership, assembled your planning team, and given some preliminary thought to evaluation, the next steps are to decide what kind of training program you want to have and when and where it will take place. You will also want to develop a timeline to help you manage the planning process. This chapter provides ideas and suggestions for different scenarios; just pick and choose what applies to your unique situation.

SETTLING ON A STRUCTURE: BIG-PICTURE CONSIDERATIONS

Answers to a few fundamental questions can help guide your decisions about the format, frequency, location, and length of your training activity, as well as scheduling issues that could affect participants' ability to attend.

Format, Frequency, and Location

Consider the following:

- ❖ What can you address adequately in a single workshop? What works better when integrated into a larger program?
- ❖ Will the training be delivered as a concentrated event over several consecutive days? Or would you prefer to stage a series of discrete events over several weeks or months?
- ❖ Is participants' anonymity important for training in any of the topics (e.g., mentoring, laboratory leadership)?
- ❖ Will the training be delivered in the context of a retreat experience? If so, at your institution or away? In some combination of retreat and on-site workshop?
- ❖ Can the training be run before or after an annual meeting to reduce travel costs for participants and speakers?
- ❖ How can you make your event more inclusive to increase its impact without increasing your budget? For example, do you want to open your event to participants from nearby institutions?

Scheduling and Length

Other issues to think about:

- ❖ When should the training be held? How long should it be?
- ❖ How much time away from the lab or home can your target participants take?
- ❖ If the sessions are spread over several months, will participants lose interest or attend only the sessions they think are important?
- ❖ Does your schedule need to factor in travel time for participants and speakers to get to and from your program site (e.g., a location on the East or West Coast or far from an airport)?



How can I organize my program's offerings to engage people's interest and make it easier for them to attend?

Experienced program planners give the following suggestions:

- ❖ Organize your topics to provide a package in one specific area. For example, consider running a program on job hunting as a triad of self-assessment, career exploration, and job search strategies.
- ❖ Pull your training events into a series and promote them together—at the first event or in your promotional materials.
- ❖ If you have a topic that requires several hours of training, think about holding one or two lunchtime sessions over a period of several weeks. It is usually easier for people to get time off in small segments. (For a discussion of helping participants obtain release time, see page 56.)

DETERMINING THE DATE

Early on in the planning process you will need to decide when to conduct your program: during the week or on a weekend, during the day or in the evening, in the winter or summer, and so on. The availability of space to hold the training and the schedules of speakers and trainees are also factors to consider while weighing your options.

Day, Time, and Season

Weekend versus weekday. A weekend-spanning event makes it possible for participants and speakers to be at work for most of the week, which might make them more inclined to attend. For many people though, weekends are catch-up time. Many people want to be home with their families. In addition, if you have administrative assistants and audiovisual staff helping you, you could be obligated to pay overtime.

Weekday Training

“Our faculty camps are on weekdays to emphasize that they should be considered part of work, and also so as not to impinge on weekends. The message is that this is not about not getting work done; it’s just a different aspect of work.”

—Leslie Sprunger, Washington State University

Time of day. A program planner with years of experience in putting together university training events has found that morning, lunchtime, and afternoon programs typically have roughly the same attendance, but the audience thins out for evening events. After 5 p.m., many participants are pulled away from local professional development programs by family needs. Even if the event is away from campus, and thus away from families, participants should be encouraged to make the most of free evenings to network with each other or with local scientists.

Tip

Planning your training around a meal, especially if the session is held in the evening, can be a draw because it provides participants with additional networking opportunities.

Summer versus winter. It may be easier to hold a training activity for academic scientists in the summer because many of them do not have to teach and have more relaxed schedules in terms of committee work. But be aware that scheduling a summer event can also be extremely difficult because of vacations and conferences. In addition, new faculty members can come on board throughout the year; if any have a nine-month appointment, they may not be around during the summer. Also keep in mind that late August and early September are typically crowded with new academic-year activities and that at the end of a semester, faculty are busy with final exams and other academic responsibilities.

Timing of a Mentoring Workshop for Faculty

“Our mentoring workshop for faculty is offered on campus in the spring semester before classes begin. Faculty members are already back on campus from the break but not embroiled in classwork. This seems to be a relatively convenient time for this particular activity, which is three hours long.”

—Melanie Sinche, University of North Carolina–Chapel Hill

Available Space

You may have to time your event to the availability of the place you want and can afford. For example, if you need to hold the training program on campus, the facilities you need for small breakout sessions or all-participant plenary gatherings may be reserved by others routinely on specific days.

Speakers’ and Participants’ Schedules

Planning for a training event also involves researching what participants, highly desired speakers, and guests have already posted on their calendars—conflicting events that would pull them away from yours. These include major research days at your institution; other events at your institution or in your community; significant local, regional, or national meetings; religious holidays; and vacations.

Conversely, you might have to schedule your training to take advantage of an open window on the calendars of certain people. For example, if you are set on having a specific speaker deliver the keynote address, you will need to work around that person's schedule. Similarly, if the leadership of your organization needs to attend the training event, your challenge will be to find a date that suits the busy schedules of several people.



How much lead time do I need?

You want enough lead time to get your event securely fixed on the schedules of your desired speakers and your target trainees. If you want your pick of speakers, it is a good idea to contact them at least a year in advance. You also will need lead time to secure the space for your training. For example, depending on the season, you may have to book space at a hotel or conference facility six months or a year in advance.

DEVELOPING A TIMELINE

Once you have decided when your training event will be held, you should develop a detailed timeline. A timeline will help you steer the planning process and determine the schedule for assigning tasks and monitoring progress. Depending on the size of your event, your timeline may span from several months to more than a year. (Examples of timelines can be found in the resources at <http://www.hhmi.org/labmanagement>.)

What to Keep in Mind

Here is some advice to bear in mind as you develop and use a timeline:

- ❖ Work backward from the event date.
- ❖ Be realistic. Build delays into the schedule.
- ❖ Be flexible. Know what deadlines are firm (e.g., your printing schedule for materials you plan to distribute at the training, booking dates for training and hotel space) and what can remain fluid (e.g., speaker confirmations), because you are bound to need some wiggle room down the line. Recognize from the start that the schedule's milestones may have to be adjusted a few times as the planning process moves forward.
- ❖ Anticipate busy times in people's schedules. Ask about vacation dates and other commitments well in advance and take that into account when developing the timeline. For example, you probably should not expect to get too much done in December.
- ❖ Be detailed. For each step, note who has to be involved (e.g., a photocopy center, a travel office, a caterer). Different people move in and out of the planning process as you move forward.
- ❖ Be aware that some steps will flow from previous ones, whereas others should be done simultaneously.

Tip

If you are planning a complicated training event—say, one that involves multiple sessions, meal functions, and hotel and travel arrangements—and your funds allow it, consider hiring a professional meeting planner to help you develop the timeline and keep you on schedule.

Tips for Sticking to Your Timeline

How do you keep everyone on track so that the timeline doesn't slip? The following tips can help:

- ❖ Make sure the planning team members and speakers are well aware of the schedule when they sign on for the project.
- ❖ Issue plenty of reminders to keep the schedule and its tasks on people's to-do lists.
- ❖ Use a checklist, and attach specific dates to all tasks.
- ❖ Don't try to do it all yourself. Spread the responsibilities out among the people who have signed up to help.
- ❖ Don't be afraid to ask for help if you are falling behind.

Managing the Planning Process

"You have to know you're going to be late with almost everything, because you don't have people whose only job is to work on the course. So build delays into your timeline."

—Laura Bonetta, BWF-HHMI Course in Scientific Management

"I've found the most valuable lessons to be the importance of delegating responsibility and breaking [course development] down into small chunks."

—Siobhan Corbett, Association for Academic Surgery

CHOOSING THE LOCATION

Many issues factor into decisions about where the training event will be held. Obvious ones are whether the training can be held in conjunction with another event, the cost of a facility, and the number of expected participants. Another dilemma for planners at academic institutions is whether to have the activity at home or away.

On-Site Versus Off-Site: The Cost-Benefit Equation

Program planners at universities generally agree that in an ideal world, their training events would be held off-site, largely because participants can better focus on the training and are more at ease about discussing sensitive subjects. But cost may be an impediment to this choice. Even a short retreat can be expensive, unless you have connections that steeply discount a site or offer it to you gratis. If your budget can accommodate some off-site time, ask yourself: Are the benefits worth the cost? Figure 3.1 may help you find the answer.

The Different Dynamic of Off-Site Retreats

“It’s hard to get people to go someplace for two or three days, but it’s clear that there is a different dynamic when people are in a room together relatively far away from where they normally function. From our experience, people are likely to be more relaxed, focused, and receptive to different experiences if they are physically removed from where they usually are.”

—Leslie Sprunger, Washington State University

Figure 3.1.
Pros and cons of on-site and off-site locations

On-Site Location	
Pros	Cons
<p>Is convenient for most participants</p> <p>Depending on the facility, could involve little or no cost for meeting space</p> <p>Makes it possible to have plenty of help for “disasters” (e.g., staff with cars there, potential back-up speakers)</p> <p>Has resources (e.g., computers, photocopying machines) that are familiar and easily available</p> <p>Allows access to support staff you already know and trust</p>	<p>Lack of anonymity (e.g., if department chairs or principal investigators are present) can stifle interaction and squelch new ideas or frankness</p> <p>People may feel less committed to the entire event as other responsibilities may take precedence (e.g., scientists will be tempted to run to the lab to check on experiments during breaks or even during talks)</p> <p>Fewer chances exist for networking during the evening because most people will go home</p>
Off-Site Location	
Pros	Cons
<p>Encourages open discussion in an environment away from senior scientists and administrative staff from the same institution</p> <p>Fosters interaction among participants over a long day; opportunities for networking increase even more if the location doesn’t allow people to return home at night</p> <p>Might induce a more active level of attendance and engagement from participants who pay some costs for an off-site locale compared with a free campus event</p>	<p>Costs for meeting space plus overnight lodging (if you need it) can be prohibitive</p> <p>Childcare, eldercare, and even pet care can be an issue for participants</p> <p>Staff travel may become an additional cost if the off-site location is far from campus</p> <p>Support staff can be of variable skill and reliability</p> <p>It is more difficult to react to a “disaster” (e.g., a speaker who doesn’t show up)</p> <p>Resources (e.g., computers, Internet access, photocopying machines) may not be easily accessible or, if they are, may be expensive</p>



How can I minimize the costs of going off-site?

If you choose to take your training event off-site, you don't need to go far away. You may want to use a local venue so that speakers and participants can sleep at home, sparing you the expense of hotel rooms. You can also reduce your costs by having participants pay a fee to attend a training session at an off-site location. One benefit of working with a collaborating organization is that it expands the list of potential sites to hold the training.

Another strategy is to offer a mixture of off-site and on-site sessions. Sessions that involve more personal topics of discussion, such as mentoring, could be offered as a one-day session off-site (no overnight accommodations involved) to foster free discussion. Sessions on less personal topics, such as grantsmanship or publishing papers, could be offered on campus, to take advantage of your institution's staff expertise. If your training will be held entirely on-site, see page 44, "Encouraging Open Discussion."

Space: The Final Frontier

As you consider the pros and cons of staying on home turf or venturing off-site (or a combination of the two), take a close look at your requirements for space. These will be determined primarily by the formats you choose (e.g., lecture-style sessions versus small-group discussions) and the total number of participants you expect. For example, if you plan to split the group into two concurrent sessions either on the same or on different topics, you'll need at least two rooms of reasonable size, not just an ample arena for plenary sessions. If you want multiple small-group breakout sessions, you'll need several rooms—preferably intimate rather than cavernous spaces—to encourage interaction.

Other considerations for the space you choose will involve asking the following questions:

- ❖ Does the facility have sufficient capacity to handle your expected attendance?
- ❖ Does the facility have the necessary audiovisual equipment—a projection system for PowerPoint presentations, table and chairs for panelists, lectern for keynote speakers?
- ❖ Is there a place to eat or will people have to go off-site?
- ❖ Is there a lounge area for informal interactions during the training?



If you are holding a multiday course, you may want to provide a quiet room where nursing mothers can tend to their children.

How Large a Group?

Another element in choosing the location for your event is the number of trainees you want to reach. You want to make the most of the resources you are expending by delivering training that will benefit the maximum number of participants but still allow each individual to get the most out of the program. What number of participants do you need to achieve that?

As usual, the answer varies widely across training activities and sponsoring organizations, and it has much to do with format. A lecture-style presentation or keynote address can reach scores of people effectively—probably as many as you have seats to accommodate, provided sound is audible throughout the room and PowerPoint slides can be read from the back rows.

However, sessions that involve interactive components work best in small groups, say, of 10 to 25 people. You can achieve this by splitting the larger audience into smaller groups that will attend different sessions concurrently or by restricting your enrollment to a smaller group of people. Your choice will have to take into account your speakers' schedules (e.g., whether they can moderate several small-group discussions held in succession) and the availability of small rooms for breakout sessions at the facility where you plan to hold your event.

For more on room set-up and size requirements, see page 66, “Meeting Space.”

TAKING ADVANTAGE OF AN EXISTING EVENT

Most professional societies hold scientific meetings or retreats for their constituents on a regular schedule. Piggybacking on such an event is a smart way to cut costs without cutting corners in content or quality. It also simplifies the planning process somewhat, because some decisions have already been made, such as when and where the event will be.

A tandem event with a professional society can bring you other benefits:

- ❖ Expertise in logistics through the society's conference staff or contract services
- ❖ Ready-made advertising via the society's membership list and established promotional channels
- ❖ A low- or no-cost means of delivering training as “value added” for conference attendees, because they are already paying for travel and lodging and the society is already paying for the space
- ❖ A pool of possible speakers from among conference registrants whose basic attendance costs are already covered
- ❖ Participants whose tight schedules might prohibit attendance under other circumstances
- ❖ A collaborating organization that is equally vested in the success of the event
- ❖ Validation of the importance of scientific management training by the society and its leadership

Tip

If you are at a university, this type of joint endeavor works best if the society is holding a meeting at your university or nearby—and if the target audience for the training is working in the discipline represented by the society.

When you hop aboard someone else's event, your activity will be positioned either during the gathering or immediately before or after it. Holding your training during the meeting may be the lowest-cost option, because your partner is covering charges for the space and it brings you a captive audience at an event already in progress. But a mid-meeting slot is also liable to be more limited in length and scope—perhaps a two- or three-hour workshop covering only a couple of topics—because the meeting agenda will reflect the professional society's priorities, not yours.

On the other hand, if you go for a bookend position, you may be able to stage a training session of one to one-and-a-half days, but you will probably have to pay for the space and meals. In most cases, a premeeting rather than a postmeeting schedule is preferable. As meeting organizers can attest, it is hard to keep people around for the final hours of the most prestigious meeting, let alone an add-on event.

Tip

Consider the time slot you are offered. For example, attendance may be poor at a session held early on a Sunday morning at the end of the meeting and it may not be worth the effort and expense for you to hold the training, despite the “convenience” of piggybacking onto the meeting.

Scheduling Your Event During an Existing Meeting

“I'm working with the Federation of American Societies for Experimental Biology (FASEB) to do a three-hour session called ‘Creating an Individual Development Plan’ at their annual meeting. FASEB is covering the costs. It's an add-on to the existing program, so there's no extra expense. The only charge is for travel and honorarium for outside speakers and for food afterward. The session will be on Saturday to eliminate concerns about conflicts, because FASEB does not usually schedule content for that day. Enrollment is open; people can sign up before the meeting. The session will have some open discussion time. After 6 p.m., there will be food to encourage people to stay and interact.”

—Philip Clifford, Medical College of Wisconsin

“My first lab management event will be a two-hour workshop in the middle of the annual meeting of the Society for Developmental Biology (SDB). Having the workshop be part of a scheduled meeting is wonderful for visibility and ease of delivery because the infrastructure is already there; we're just plugging in. We'll have one session on finding a job and another on writing a dynamite proposal. Because the workshop will be during the meeting, it will incur no new or additional expenses. The president of SDB allocated funds from the meeting to cover travel and other costs for our four speakers. The mid-meeting timing was dictated by the budget, but it also guarantees an audience from people who will already be there. Attendance is open; there are no capacity limits because our workshop is one of two concurrent sessions. This is the first of what may be several mix-and-match modules that we offer as individual workshops at regional SDB meetings. Most of these meetings are only one-and-a-half days long, so a two-hour module would be appropriate.”

—Karen Bennett, University of Missouri

Scheduling Your Event Just Before an Existing Meeting

“We scheduled our training for junior surgical faculty just before the annual Clinical Congress of the American College of Surgeons (ACS). The idea is that ACS would be a magnet. We were concerned about the financial risk of a freestanding event without the draw of the college—we had no idea what attendance would be—and we didn’t want to plan a concurrent event that would compete with ACS. Most of our members will attend the ACS meeting anyway, including senior members who would be available as faculty. Having a one-and-a-half day course just before the ACS meeting will encourage attendance, limit attendees’ time away, and cut down on their travel costs.”

—Siobhan Corbett, Association for Academic Surgery



How do I approach a potential professional society partner?

First, do some homework to develop a well-thought-out plan to make sure that your idea fits with the society’s mission, which is usually stated plainly somewhere on its Web site. If your concept falls outside the society’s specified purpose, it is unlikely that you will be able to garner support, especially financial.

After reviewing the society’s mission, talk with the society’s staff (e.g., executive director, education officer), the chair of a relevant committee, or a member of the governing council you know has an interest in scientific management training. You will need to make clear the value that your event will bring to the society’s meeting and its participants and be able to justify any costs to the society. Another selling point is your offer to be involved in organizing the event, backed up by well-considered ideas for the program and other possible funding sources, if needed. Make sure you contact the society as far in advance as possible. (Also see page 17, “Collaborating with Another Organization.”)