TRAINING SCIENTISTS TO MAKE THE RIGHT MOVES

A Practical Guide to Developing Programs in Scientific Management

Burroughs Wellcome Fund

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This publication is also available online at ***http://www.hhmi.org/labmanagement***.

Project Developers: Maryrose Franko, Ph.D., and Martin Ionescu-Pioggia, Ph.D.
Editor: Laura Bonetta, Ph.D.
Managing Editor: Patricia Davenport
Production Manager: Dean Trackman
Designer: Raw Sienna Digital
Writer: Barbara Shapiro
Copyeditors: Cay Butler and Kathleen Savory

Burroughs Wellcome Fund
21 T.W. Alexander Drive
P.O. Box 13901
Research Triangle Park, North Carolina
27709-3901
http://www.bwfund.org

Howard Hughes Medical Institute
4000 Jones Bridge Road
Chevy Chase, Maryland 20815-6789
http://www.hhmi.org

Chapter 7

RECRUITING AND REGISTERING PARTICIPANTS

Once you have an agenda with speakers, you will need to start publicizing your training event and enrolling the people you want to take it.

ANNOUNCING THE EVENT

If you have the benefit of meeting-management services, the firm you engaged probably takes care of publicity and registration. But if you are on your own, you can use different channels to reach people you want to participate in your training session—membership lists of professional societies, advertisements in scientific journals, posters and flyers on campus and in career development offices, announcements on Web sites, e-mail to students, and word of mouth.

Make sure your brochure, flyer, or other promotional piece contains the critical "what, where, and when" information and gives potential participants a good idea of what they can expect to learn. Include information on how to register, deadlines, registration fees, and whom to contact for more information. (For a discussion of what to ask participants when they register, see page 58, "Registering Participants.") Also be sure to acknowledge the organizations that are sponsoring and contributing to the event.

See the resources at *http://www.hhmi.org/labmanagement* for examples of brochures and registration forms for lab management workshops and courses.

Tip

It is important that participants know that the speaker roster is composed mainly of active, successful scientists. Junior faculty and postdocs want to hear from people who have faced challenges similar to the ones they are facing or will soon face. When you advertise the training, play up the involvement of the scientists.

Some Event-Promotion Strategies

"At ASM we announce our training programs at least six months ahead of time. The Web site for our summer program is up in March with information about the content, deadlines, and all forms. If we tell people early when it will be, where it will be, and why—goals for what we expect them to leave with—then there's enough time for people to make plans."

—Amy Chang, American Society for Microbiology

Some Event-Promotion Strategies

"We post announcements of our Experimental Biology workshops on our Web page and send announcements to all the physiology department chairs, all our awardees, all our trainees via a list server, and all APS members via e-mail from our executive director. We also put out flyers announcing the sessions in the society's office and at the other events we sponsor."

—Melinda Lowy, American Physiological Society

"I have access to lists of all new faculty hired within a specific time period at the University of Cincinnati. I e-mail them and their division director or chair with details about an upcoming training activity. We also have a postdoc e-mail list that's updated monthly."

—Sandra Degen, University of Cincinnati and Cincinnati Children's Research Foundation

"At UCSF we advertised through a number of postdoc and faculty list servers. We also posted large posters on easels, which had a pocket for our brochures as well as many small signs around campus. Good places to put a large easel are in front of cafeterias, the gym, or at building main entrances. When we first put our signs up I was refilling the brochure pocket daily! There is great demand for leadership and management training. We had over 200 people apply for only 100 slots available in our course."

—Samara Reck-Peterson, University of California–San Francisco

TWO OBSTACLES TO ATTENDANCE

The Challenge of Obtaining Release Time

One potential obstacle to attendance is prospective trainees' inability to obtain release time. They may be reluctant to request time off from research, teaching, or clinical responsibilities to attend the training, however helpful it might be. For example, postdoctoral fellows, particularly international postdocs, are often uneasy because their absence from the lab may not be viewed positively by the principal investigator. Here are some ideas for helping beginning scientists obtain release time:

- ❖ Keep the university's leadership, including department chairs and senior faculty, informed about the training and how it can assist them in recruiting and retaining top scientific talent.

Tip Find a high-level advocate who can help you convince your organization's leadership that trainees should be given release time (also see page 11, "Obtaining Buy-In from Your Organization").

- ❖ Announce the training date, including any application process, at least three to four months before the event (physician-scientists typically have clinical responsibilities assigned at three-month intervals).

- ❖ If there is an application process, consider requiring a letter of nomination so that the principal investigator or department chair can provide confirmation of a commitment to release time.

- Be sure to follow up your event with informative news releases to help attract attention to the excitement and importance of your program, so that this type of professional development activity is recognized as a smart choice.

The Challenge of Childcare

Investigators with young children often find it difficult to commit to a multiday meeting that lacks childcare facilities. Experienced planners have tackled this issue in different ways:

- Offering childcare. A number of scientific societies offer childcare services at their annual conferences, either on-site or in a nearby hotel using licensed, bonded services; convention centers often have connections to these services and can put you in contact with them. Parents must sign waivers; the contracts are between the parents and the childcare service. If your organization's policies allow for this type of service, you have three options: You can let participants pay for the childcare, or you can subsidize it or pay for it entirely. Make sure that you have childcare arrangements in place at the preregistration stage so that you will know how many children will attend.

Attendance at a Multiday Course

"Childcare for a week-long course is a huge problem. Sometimes the people most in need of this training can't come because they don't have the flexibility to be away from home for a week."

—Maryrose Franko, HHMI

- Making referrals for local childcare. For smaller training events, there may not be enough children to make it worthwhile to offer childcare, because of the cost of liability insurance. You can help participants with young children by providing the names of available services at or close to the meeting site, and leave it up to them to make their own arrangements.

- Providing a family lounge. Some organizers provide a "family lounge" where nursing mothers can breastfeed or where parents can have a few moments of quiet time with their children. These spaces are also helpful for participants who bring a spouse, friend, or someone else to look after their children.

- Ending sessions by late afternoon. Many training event organizers do not schedule any sessions past 5 p.m., to allow participants with childcare responsibilities to leave on time.

REGISTERING PARTICIPANTS

Registration Form Basics

You will want to know the following:

- ❖ Name (as the participant would like it to appear on a nametag)
- ❖ Degree(s)
- ❖ Current position (e.g., faculty, instructor, postdoc)
- ❖ Affiliation
- ❖ Mailing address
- ❖ Phone and e-mail addresses

Additional Information You May Want

If you anticipate more applicants than slots, think ahead of time about how you will choose participants and make sure that your application materials ask for data that you will need to make this decision. For example, you will probably want to choose participants according to how much you think they will benefit from the training you are offering. You also might want to ensure diverse representation in terms of experience and points of view. To elicit this type of information, consider including the following items on the registration form:

- ❖ Career stage/date started in current position
- ❖ Gender
- ❖ Citizenship (if you have an international constituency)
- ❖ Funding situation
- ❖ Research discipline
- ❖ Future plans
- ❖ Commitments outside of research (e.g., teaching, clinical, or committee responsibilities)

Consider asking for a brief essay on why the applicant needs to take the training and, perhaps, a letter of recommendation. For examples of application and registration materials, see the resources at *http://www.hhmi.org/labmanagement*.

Tip Regardless of whether you intend to have people apply for the training, it is helpful to obtain information about participants at the time of registration that you can use to tailor the training activities and evaluate their effectiveness after the event.

Q
A

What kinds of items might I include on the application form to help with the selection of applicants?

Organizers of the 2005 BWF-HHMI Course in Scientific Management developed an application/registration form to determine the applicant's need for the training and whether the applicant's career level was consistent with the target audience for the course (i.e., junior faculty with newly established labs and advanced postdocs on the verge of starting a lab). To elicit this information, the application form contained questions about degree(s), current position, and affiliation. Applicants were also asked about the following:

- ❖ If a postdoctoral fellow, the number of years they had the position, if they had started applying for a faculty position, and when they anticipated beginning the appointment
- ❖ If a faculty member, the number of years they had the position and if they managed their own laboratory and, if so, the number of people in the lab
- ❖ The area of research (e.g., basic versus clinical science) and the percentage of time spent on research (if they were physician-scientists). (This question was asked because the course organizers wanted a balance of basic scientists and physician-scientists.)

In addition, they were asked to give three reasons why they should be admitted to the course.

Tip

If you have Web development staff available to help, consider setting up a Web site to collect participants' registrations and post training-related materials. Examples of organizations that use this approach for their training events and meetings include the Office of Postdoctoral Education, University of North Carolina–Chapel Hill (*http://postdocs.unc.edu/ops.htm*); the Office of Academic Career Development, University of Pittsburgh Health Sciences (*http://www.oacd.health.pitt.edu*); and the American Society for Microbiology (*http://www.asm.org*).

When Demand Exceeds Supply

If advance registration for the event exceeds capacity, you have two options: whittle down the registration list or find space (and possibly speakers) to accommodate the overflow. If the second option is not possible, you might try one, or some combination, of the following:

- ❖ Choosing participants according to the criteria you have selected (see page 58, "Additional Information You May Want")
- ❖ Using a first-come, first-served approach
- ❖ Maintaining a waiting list
- ❖ Letting overflow registrants know that you will offer the training again

For an open event, be aware that people may not hear about it in time to register and then show up anyway. If you can accommodate these unanticipated participants, you will need to have extra training and registration materials available, know where you can locate extra chairs, and have additional staff on-site, at least for the first few hours, to help with registration.

The Problem of No-Shows

The opposite situation—people who register but don't attend—is also a problem and one that can have budgetary consequences when you pay for meals and rooms that aren't used. To minimize the number of no-shows, you can

- ❖ Select participants who really want to attend and will benefit.
- ❖ Emphasize to registered participants that they should let you know ahead of time if they cannot attend, so that someone on the waiting list can take their spot. (Most people understand the value of these activities and will not willingly keep someone else from attending.)
- ❖ Charge a registration fee (even a small charge acts as a prod to appear).
- ❖ Build buy-in from your organization's leadership, such as department chairs, who then make known their expectation that those who register for the training should attend.

Tip Make sure you plan for some attrition; for example, one planner at an academic institution expects as many as 10 percent of registered participants not to show up.

A Lesson Learned

"At Cincinnati Children's Research Foundation, I've run a six-hour orientation for new faculty on-site, with faculty or colleagues as speakers. The only cost is food. But maybe a third who sign up don't show up. These are usually faculty with clinical responsibilities. For a grant-writing workshop, 130 of 170 registrants showed up, even with the requirement of a small registration fee. In the future, we'll try to communicate better about why it is important to attend and to let us know if they can't."

—Sandra Degen, University of Cincinnati and Cincinnati Children's Research Foundation

Participant Confirmation

Send a letter or e-mail to participants confirming that their registration has been processed. Find out whether participants require wheelchair or walker access or if they have a medical condition of which you need to be aware. If you are planning a meal function, find out whether they have any special dietary restrictions or requirements. If applicable to your event, explain how arrangements for travel and hotel accommodations are being made, including whether participants will be expected to share a room. The more you can tell participants in advance, the better. For example, if they are coming from out of town, tell them about the weather. Information about suggested attire, exercise facilities, and ground transportation is also helpful. Make sure to give them a contact phone number for the facility that their family and friends can use in case of an emergency.

Tip

Consider creating a mailing list server of registered participants. This is an easy and quick way to send reminders and materials that can get participants thinking about course topics. It is also a good way to distribute any pretraining assignments and to gather posttraining feedback. A mailing list server also helps to build a community of people who can share their challenges and solutions to building a successful research career.

What You Might Ask Participants to Bring

If you are including sessions with hands-on activities or a critique-and-feedback structure, you can get a head start when you confirm participants' registration by asking them to bring work products with them or send them in ahead of time. Depending on the topic of the training session, the following are examples of items you might ask participants to prepare in advance:

- An aims statement, a budget, or an entire grant proposal for a session on grant writing
- An introduction to a grant resubmission (the part that addresses the review panel's critique)
- A PowerPoint presentation of their work as practice for speaking to a professional group
- A draft lesson plan for a session on teaching
- Real-life case studies on specific topics, for group problem solving. (You will need to assure trainees that identifying information, such as people's names and institutions, will be removed.)
- An abstract or full manuscript for a session on scholarly writing
- A CV, to obtain advice on finding a job, reappointment, promotion, or tenure

You might also want to ask participants to do some reading ahead of time so that they are prepared for the discussions.

Tip

If you are doing Myers-Briggs Type Indicator or Skillscope 360-degree assessments, alert participants that "homework" needs to be completed before the event and indicate any related submission deadlines.