Guidelines for ESA Section Tours

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The purpose of these guidelines is to help two groups: (1) the tour organizers and (2) the ESA volunteers and paid staff facilitating the activities. Because each tour is unique, the guidelines and checklist may not answer all questions for the tour organizers. However, the document should help everyone and improve coordination across all groups. These guidelines apply to tours held in the USA and that will be hosted for less than five working days. Longer tours or tours held outside the United States will likely require modified guidelines.

Objective of Events: To provide an educational event concerning a special technical topic that convenes ESA section members and stakeholders from outside ESA. ESA holds a unique position to host these tours and provide a platform for exploration of challenging and nuanced issues because of its role as an objective scientific organization. The special topics will likely be a current topic on which there is public interest. The event provides an educational opportunity to ESA membership and an outward facing educational opportunity for stakeholders that have interest in the technical topic. The event provides live, hands-on engagement with an entomological topic that is interesting and accessible for both entomologists and non-entomologist stakeholders. The event must be held outside of the ESA Annual Meeting and is not intended to be a symposium-style meeting. While tours provided hands-on engagement in 2017 and 2018, there are other approaches, such as workshops, that can be considered to serve the objectives.

Proposal Development and Evaluation

The Section Governing Council will announce a call for proposals each year. The deadline for submission will be August 1 for events to be held in the subsequent calendar year to provide adequate time for organization and implementation. Support for events by sections will be determined by September 1 to offer event organizers the opportunity to promote the event and recruit organizers and participants at the ESA Annual meeting. Depending on resources, it is likely only a few tours can be executed each year.

Factors to consider and include in a proposal

1. Tour purpose, goals, significance, and need. Alignment with short- and long-term goals of the Section.

2. Budget: income will include registration fees and donations to subsidize the costs; include costs for printing of tour program and information handouts, travel by organizers, transportation during tour, lodging, facility rental, etc. See budget template in Excel file.

3. Commitment from organizers. Include a list of key tour organizers and assistants. Section leaders and ESA Headquarters staff can provide consultation and support, but are not available to carry out logistical work. Some roles that may be important are

            a.  Local Arrangements: Person who is familiar with the area/areas where the tour will take place.  Somebody with enough local contacts that would help facilitate their role.

            b.  Tour Stop Organizer(s): Key contact for one or more of the tour stops.  This will be the person responsible for logistics at the tour stop (driving directions, best access to the tour stop, porta-potties, water access, etc.)

            c.  Financial Support:  Person contacts potential sponsors for donations.

            d.  Outreach:  People who will be responsible to reach out to stakeholders to generate interest to attend the tour.

            e.  Materials and Supplies:  Person who will be responsible for tour book and other materials needed throughout the tour.

4. Tentative agenda listing arriving/departing airports, locations, topics, speakers, etc.

5. Rough draft of logistical considerations and approximate costs as best known:

a. Determine who will attend and the target audience. Determine the maximum number of participants. For tours, total participants should be considered in terms of “bus loads,” which typically are between 45‒52 passengers per bus.

b. Provide a tentative hotel location for each night of the tour.

c. Describe tour bus or other transportation needs.

d. Provide other facility and resource needs.

Evaluation by the Section Governing Council

The Section Governing Council will evaluate tour proposals and make selection(s) based on quality of submission and stage of ideation, understanding of finances, consideration of any risks, and alignment to overall Section objectives stated above. Public announcement of winning proposals will be made at ESA Annual Meeting in November.

Implementation

First Phase (7-8 months before event)

1. Set a date for tour according to various factors including tour leaders’ availability, and if appropriate, phenological status of the organisms related to the tour.
2. Prepare schedule of deadlines and necessary milestones.
3. Work with financial approvers and controllers within the section and ESA. Each section has a treasurer who approves the tour expenses and sends a check request to ESA Headquarters. A draft event budget (see template) will be required with the event proposal. Any revisions to the budget should be shared with section leadership. To process reimbursement, the section treasurer will need an invoice/receipt for each expense and the reimbursement address.
4. Develop an invitation letter that includes the meeting name, location, date, objective, and agenda overview. See attached letter for an example.
5. Determine cost per person which will determine eventual registration fee. Account for any free registrations.
6. Recruit external resources if needed to offset registration fees.
7. Develop stakeholder list and begin emails and telephone calls. Do not lessen communication with stakeholders until they are registered.
8. Negotiate and get bids on major expenses.
9. Finalize all contracts and make deposits for hotels, bus, meals, etc. The ESA has valuable expertise regarding hotel contracts.
10. Have tour-stop organizer do a drive around of the actual tour to anticipate how the meeting will flow, anticipate issues such as parking or need for port-a-potties, etc.

Second Phase (5-6 months before event)

Have routine progress update meetings with key tour organizers.

Advertising and publicity

1. Initial launch to Section members in newsletter.
2. Any materials posted to Section website and/or distributed via Section newsletter, etc. should be reviewed by Section Governing Council.
3. Coordinate with ESA Headquarters to develop Section website with all details and continually update content as more details are known.
4. Determine what type of media (if any) that might be utilized to document the tour activities and lessons learned. Consider pro’s and con’s to particular media and how it would influence participant freedom to talk.
5. Provide monthly updates to Section membership through the website and newsletter to maintain momentum and publicity.

Tour Participants

1. Develop an application and selection process. Possibly use two application "baskets" - one for travel grants, including students, post docs, and maybe early career professionals.  A second for all other stakeholders.
2. Select a deadline for applications so that applicants can be notified 2 months before the tour to allow time for travel arrangements.
   1. Launch the application process to section members.
   2. Notify applicants of acceptance.
   3. Ensure all participants are registered by specific date.
3. Have a contingency plan if you need to "encourage" additional participants.  Consider broadening the stakeholder base.
4. Develop a registration site for payments (ESA staff will assist).
5. Keep the registration fee simple and the same for everyone paying.
6. Consider sending a pre-meeting survey after participants register to gain additional insight as to what they hope to learn from the event, how communication of the event to that point was going, etc.
7. *Suggestion.* State on the tour sign-in website that applicants should provide a short CV or biography, and maybe also a brief statement of what they intend to contribute and get out of the tour.  Tell them this will be shared with other participants to promote better communication and a collegial environment on the tour.  VIPs will get personalized invitations, etc.  In the case of VIPs, we know their qualifications and can perhaps waive requirements for bios and statements of purpose, but no price breaks, and even these important participants will be told - "Register early. Once available seats are filled, late registrants will be put on a wait-list."  Everyone else will be treated equally - if they meet the criteria established for "stakeholders", they will be immediately told "Congratulations! Now register ASAP!"  None of this - submit your essays and we will get back to you once we have determined how you stack up with the other stakeholders.  Better to set the criteria early, as part of the tour proposal, and provide immediate approvals as appropriate.

Third Phase (2-3 months before tour)

1. Prepare tour/meeting program.
2. Have tour-stop organizer do a drive around of the actual tour to anticipate how the meeting will flow, anticipate issues such as parking or need for port-a-potties, etc.
3. Communicate with each tour stop host to ensure alignment with tour objectives and for them to understand who will be attending. Possibly include hosts in a planning meeting.
4. Send reminder emails to participants about making flight arrangements or any other details they may need to know to get to arrive at the tour starting location. Ask participants to send flight information to organizers to help in planning for transportation to the airport. Include key information like arriving and departing airport and guidelines on earliest departures at the end of the tour.
5. Send electronic program in advance.
6. Prepare tour bags and any “take homes”.
7. Determine if an anonymous tour live feedback mechanism will be used.
8. Develop a post-tour feedback survey.
9. Confirm all local arrangements, including catering menus, audiovisual needs, bus schedules, etc.
10. Have routine progress update meetings with key meeting organizers.
    1. A key activity is anticipating questions and understanding who will serve as a moderator.
    2. Determine how to structure and execute the wrap up session.

Items to arrange prior to the tour

1. Recruit technicians, graduate students, or locally based Section members to be runners, helpers, and personal assistants.
   1. Helpers should arrive to sites, restaurants, and hotels ahead of participants to ensure everything is ready.
2. Work with hotels to issue rooms keys early in the day so they can be handed out.
3. Understand if anyone has food allergies, dietary restrictions, and other special needs (ask during the registration process). Ensure restaurants can accommodate meals.
4. Prepare snacks and coolers of drinks; have sunscreen, mosquito repellant, and hand sanitizer available.

If any payments need to be made on-site, be sure to coordinate payment with the Treasurer a few weeks in advance

Post-Tour activities

1. Finalize budget and total costs versus funds received (see budget template in Excel file).
2. Prepare summaries for a variety of venues including Entomology Today, refereed journal, ESA-PIE website, ESA Annual meeting, Section leadership annual report, or other meeting (presentations or posters). Include the following in the reports:
   1. What participants learned and experienced
   2. Any plans for continuing interactions and activities
   3. Positive aspects of event and logistics

For internal reports, difficulties and what you would do differently

Typical Letter Sent to Stakeholders

This letter was used successfully during preparation for the first tour. It had the objective, rationale, and proposed agenda.  That ultimately is what every tour must prepare.  All organizers either used the letter or repeated the contents of the letter when recruiting participants and explaining the event. A letter with Section governing council names and official letterhead provided credibility. Future organizers are encouraged to take time to carefully develop a similar letter.

This document became the foundation for everything.

1. Provided content for any subsequent communications, web posting, newsletters, etc.  Any later reviews of materials were very short because this had already been well developed.
2. It was leveraged / recited for all talking points as organizers recruited stakeholders to attend
3. It became the guide as to what the tour would ultimately deliver. If there were any questions with tour-stop host on what the goals were and what was promised, the letter provides the guidance.