INT Organizer Guidelines – Table of Contents

I. ORGANIZER CHECKLIST

Preparation for the program

- **Send webpage materials**: Send text and images for the program-specific webpage to coordinator.
  - Inform INT staff if there should be a "full consideration" application deadline (recommended).
- **Contact key participants who organizers wish to participate**: Organizers should contact senior and junior physicists whose attendance would strongly enhance the program.
- **Provide announcement list and text**: Organizers should assemble list of names, email addresses, and institutions of people who should be encouraged to apply. Provide this list and the announcement text to the coordinator, who will send the emails out. Please make an effort to include women, members of other under-represented populations in the physics community, and early career scientists in your list of names.
- **Review applications**: Coordinator will send lists of who has applied; organizers should review the final applicant list (after the application deadline has passed) and let the coordinator know how to proceed (send invitations, speaker consent forms, etc.).
  - The organizers will need to provide a list of who they wish to invite to participate "in-person" at the INT and a list of who they would like to participate via Zoom only.

Before the program

- **Schedule speakers**: Organizers should contact speakers directly to ensure date and time work.
  - Avoid scheduling talks reserved for recurring INT seminars (workshop weeks are exempt from this scheduling requirement). Check with coordinator for more details.
  - Talks should begin no earlier than 8:00 am Pacific Time.
- **Zoom meeting** (if applicable): If the organizers selected the hybrid option, the coordinator will set up a Zoom meeting for the program and share the meeting ID/password with the organizers. Please inform the coordinator whether you want the Zoom link to be shared with only the program participants or more widely (i.e., the INT subscriber lists).
- **Speaker recording consent forms** (if applicable): If you would like to record the talks, inform the coordinator; the coordinator will send video recording consent forms to all speakers whose talks will be posted or recorded.
  - Note: the INT speaker consent forms only cover video recordings, which will be posted to the INT website and the INT YouTube channel. If the event wishes to post the recordings on another platform, the organizers must inform speakers and obtain permission separately.
- **Code of Conduct Zoom meeting:** The coordinator will reach out to the organizers 1-2 weeks before the first day of the program to arrange a 15-20 minute Zoom meeting to review the INT Code of Conduct with the INT Director and the coordinator. Typically, the meeting will take place the week before the start of the program.
- **Update seminar schedule**: Please provide the coordinator the seminar schedule (speaker name, institution, talk title, and times) by Thursday before each program week.
- **Smart board training**: A successful program depends on the use of the INT's smart boards. The smart boards will require a brief tutorial of how to log in and how to get optimal use.

During the program

- **Record the session**: If applicable, record Zoom sessions to the **cloud**. Make sure speaker signed a recording consent form beforehand. After each day's session finishes, let the coordinator know when they can log onto Zoom and download the recording to post it.
- **Take daily Zoom tally**: If Zoom is an option, please provide a daily tally. It is best to record "peak attendance" midway through the morning session. Send the tallies to the coordinator at the end of the program. If unknown, an estimated number is okay.
- **Forward talk slides**: Forward speakers' talk slides (PDFs) to intmail@uw.edu so it can be posted to the online seminar schedule.

- **Review Code of Conduct**: Go over INT Code of Conduct with participants at the beginning of every week.

II. INT PROGRAMS AND WORKSHOPS

Programs

Programs are proposed by interested members of the physics community and reviewed by the INT's National Advisory Committee, which forwards its recommendations to the Director. Accepted programs are assigned a time and budget. The INT staff takes care of most of the program administration, allowing the organizers to focus on scientific issues. **Submission of a proposal implies a firm commitment by each organizer to spend no less than half the duration of the program, and that there will be at least one organizer at the INT throughout the program.**

Programs are intended to bring interested physicists together for an intense period of individual and collaborative research. One principal program activity is the INT seminar, which provides an opportunity for program participants to describe relevant research. We encourage organizers to limit seminars to one per day. The remaining time is left free for research, discussions, and small informal seminars. An embedded workshop may be included within a program.

We hope to work with you to put together an interesting and lively program with a mix of participants that includes senior and junior researchers; graduate students accompanied by their advisor are also welcome. **We strongly urge you to encourage the participation of a diverse pool of participants, including women, members of other under-represented populations in the physics community, and early career scientists.**

The INT has a limited amount of office and desk space available. We have found that having no more than 20 visitors at any one time during a program tends to afford a more comfortable and productive research environment. Your coordinator will let you know the number of visitor desks we can guarantee.

We encourage organizers to take a relaxed approach to the scientific program. You should schedule seminars for the first week of the program a week prior. Once the program is underway, it is natural to organize the scientific program around the interests of the weekly participants. Seminars are usually planned a week ahead of time, allowing the program to evolve spontaneously. The INT staff is well-equipped to manage the administrative details of your program.

Workshops

Workshops are directed towards physicists at the post-doctoral and more senior level; graduate students accompanied by their advisor or a designated mentor (senior scientist) are also welcome. A workshop is often held as part of a program; others are independent of programs, approved by the Director, and often are recommended by the INT's advisory committee. While generally held at the INT, some workshops have been conducted elsewhere.

You should plan the workshop agenda many months in advance of its starting date, so that announcements can be widely disseminated in a timely fashion. It is imperative that you keep the INT offices and the individual in charge at the location of the workshop informed of the schedule.

Summer Schools

Occasionally the INT will host a topical summer school with 30-50 students. For these events students are housed in UW dorms and receive a meal card valid at campus dining facilities. The INT tries to cover lodging and food expense for students, but not travel expenses. Lecturers typically have both local and travel expenses reimbursed by the INT, up to allowable limits.

III. PROGRAM BUDGET

The program budget you have been given is intended to partially cover the expenses of program participants, including any costs of associated workshops or schools, and of seminar speakers. Unless unusual circumstances dictate otherwise, the INT tries to treat all organizers and all participants equally. The program coordinator and administrator will work on support arrangements, starting from your recommendations. Any problems will be checked with you. Following is a description of the types of support that are available.

Per Diem

The Institute generally pays a portion of local (per diem) expenses. The total dollar amount of support provided will depend on the housing arrangements we are able to make for the participant. The purpose of these funds is to defray those extra expenses incurred by participants through living away from home. Participants will be reimbursed for per diem expenses after the completion of their visits. Exceptions may be possible for foreign visitors or others where our usual procedures would cause financial hardship.

Travel

The DOE believes (and we concur) that people should "vote with their feet." This means that participants should use their own grants or contracts to pay travel to and from the INT. Exceptions may be made if visitors have no sources of travel funds. You must have a consistent policy on such exceptions, one that can be explained to other visitors. This must be discussed with the Program Coordinator prior to offering such support.

NOTE: Due to regulations governing federal funds, **airfare must be on a US-flag carrier** (the ticket must reflect the US-flag carrier's designator code and flight number). There are some exceptions to this rule, but you must check with the INT first. If this presents a problem, please discuss it immediately with the program coordinator.

Seminar Speakers

You may wish to reserve part of your budget for special seminar speakers. Many organizers have used these funds to bring experimental physicists for short visits. The INT can cover all reasonable expenses (travel and local costs in accordance with DOE and State limitations) of seminar speakers, if this helps you attract special speakers.

Exceptions

We try to be flexible; exceptions to these guidelines can be made. For instance, if a particularly valuable participant insists on more generous support, an organizer may feel he or she has to take an additional step. As this can cause problems with those participants who have been treated less generously, such exceptions should be made reluctantly, with tact, and only after discussions with the INT staff.

Financial Commitments

Financial commitments to participants are not official until the INT has issued a letter detailing our understanding of the financial arrangements.

IV. PROGRAM ADMINISTRATION

Staff Resources

INT Administrator

The INT administrator is responsible for visitor visas requiring sponsorship by the University of Washington, and visitor payroll. Questions on any INT policies and procedures can be directed to the administrator.

INT Program Coordinators

The responsibilities of the program coordinators include the development and mailing of all official letters (invitation, regret, waitlist, confirmation, etc.), management of program files, tracking program expenses, processing reimbursements, and communicating visa requirements. The program coordinator also screens information for the program's website, and helps the organizers with the initial program announcements.

As soon as your program has been assigned to one of the coordinators, this person will contact you and begin work on the program. This person will be your primary contact at the INT for your program. Status reports on participant responses, space, and budget, will be provided throughout the program.

In addition to general office duties, the coordinator will build and update INT program web pages. During the running of an event, they produce and distribute weekly seminar notices, provide participant orientation, and post program and workshop talks to our website. Talks are to be submitted in electronic format.

Owing to the small size of our office staff, visitors will be expected to handle many routine tasks, such as faxing, photocopying, mailing, etc., on their own.

Communication with INT

At the beginning of your program, the lead organizer and the program coordinator should establish communication procedures. Email communication has proved to be the most efficient method in the past. If you will be away from your home institution for an extended period of time, please provide the program coordinator with your forwarding address, telephone number, and email address. In the case of multiple organizers, one person should be designated as the lead correspondent with the INT and invitees.

Program Web Page

The INT will post a page devoted to your program on the INT web site. This page will generally include a few paragraphs, provided by you, summarizing the expected scientific content of the program. It will also contain links to the organizers' and program coordinator's email addresses, and an application form for prospective participants to complete. Once completed, this application is submitted electronically to the program coordinator, who will compile the applications for your eventual review.

While your program is in the planning stage, we do not post the list of possible participants, their contact information, or anticipated dates of attendance. This information is to be exchanged only between the INT and the program organizers.

Once a program is underway, the web page (which must reside on the INT server, for archival purposes) can contain talks from program seminars, links, etc. Please feel free to make suggestions or requests to the program coordinator regarding web page content, and we will help you set it up.

Announcement and Invitation Procedure

Although organizers often contact a number of the prospective visitors, **all visitors participating in-person must get a formal letter from the INT**. All letters containing commitments, financial or otherwise, must be sent by the program coordinator through the Director's office.

Organizers should contact senior and junior physicists whose attendance could provide scientific leadership to the program and urge these people to attend the full program. Participants who need a visa should be sent an invitation as early as possible to allow sufficient time for them to apply.

After the website has been published, announcements from the INT may be mailed to prospective participants. It is the organizers' responsibility to provide suitable lists of prospective participants to the program coordinator. It is the program coordinator's responsibility to send the announcement letters, which will direct the recipients to the program web page, where the application may be found.

The event can be advertised to both the announcement list and to the large INT subscriber and seminar lists. The organizers will receive updates on applicants, and will need to identify which applicants should be invited. Only those who are formally invited will be able to attend in-person or virtually.

By submitting an application, an individual has indicated they would like to participate, even if their plans are only tentative. After the nominal deadline for applications has passed, the program coordinator will create a preliminary directory and budget for the program. Please review the applications and indicate whether the participant requests or needs something other than the standard INT housing and meal allowances, and what priority you would assign to any unusual request. Please forward information on new participants to the INT staff promptly (this includes both written and email correspondence). The more up-to-date we are, the more successful we will be with the difficult tasks of housing, visas, etc. There is no need to wait for definite dates or an absolute commitment; the INT staff can follow up with participants that are uncertain about their stays.

Approximately a few months prior to the program, the bulk of invitations are mailed to those who have been selected by the organizer from the applications received. This final mailing includes a reply form and detailed information about financial support, housing and transportation. The coordinator will send an email to virtual participants about one week prior to the start of the program with information on how to access the Zoom meeting.

INT Code of Conduct

By attending a virtual or in-person INT event, participants agree to abide by the INT Code of Conduct as described here: https://www.int.washington.edu/visitors/int-code-conduct

We require organizers to go over the code of conduct weekly before the first talk begins.

Terminology

In order to avoid confusion, we have developed standard terminology to use when referring to program correspondence and participants.

Announcement

This is the letter we will send to the participants you may wish to invite.

Application - UW INT Event Application

This is the form which is available from the program web page. Announcement letter recipients, as well as other interested parties who view the event web page, will need to complete the online application. Their submitted information should provide a fair idea of intended attendance rates at the program.

Invitation

This is the letter we will send to those participants whom you would definitely like to invite for a specific period or length of time. This letter will make a specific financial commitment and will include guides.

Reply form

This is the form we will enclose in the final invitation mailing. Participants will be asked to complete by a reasonable due date. Information submitted on this form will be entered into program database.

Regret letter

This is the letter we will send those people to whom we are not able to offer a place in the program.

Waitlist letter

This is the letter we will send those people to whom we are not presently able to offer a place in the program, but whose participation would be welcome should we have any cancellations.

Confirmation Letter

This is the letter we will send to those participants whose housing arrangements are finalized. This letter reiterates the INT's financial commitment, details of local arrangements, and travel information.

Upon arrival, program participants will receive a packet that will include information on INT and University of Washington facilities and services. Office space will be assigned at this time.

Computer Facilities

The INT has now ceased to automatically provide visitor accounts on desktop computers for all INT program participants, since a vast majority of visitors now bring their own laptops. Visitor accounts for participants who do not have laptops, or who otherwise have special computing needs, can be set up on request.

Final Reports

At the conclusion of the program, the DOE requires that the organizers submit a brief report (one to two pages) summarizing the scientific activities of the program, an explanation of how your diversity statement was implemented, a description of participant interactions, and the administrative aspects of the program. Reports should be completed within two weeks of the conclusion of the program and sent to the INT by email or post.

In addition, a short description of the scientific goals and achievements of the program or workshop should be sent to us for posting on the INT web page, preferably with an eye-catching graphic.