

## EMBO Global Lecture Courses Organiser guidelines

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**EMBC Member States (A):** Austria, Belgium, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Lithuania, Luxembourg, Malta, Montenegro, Netherlands, Norway, Poland, Portugal, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkey, and United Kingdom

**EMBC Associate Member States (B):** India, Singapore

**Countries / territories covered by a co-operation agreement (C):** Chile, Taiwan

**Countries / territories eligible for co-funding by EMBO and The Company of Biologists (D):** Brazil, Canada, China, Japan, Mexico, Republic of Korea

**EMBO subject areas:** Cell Cycle, Cell & Tissue Architecture, Cellular Metabolism, Chromatin & Transcription, Development, Differentiation & Death, Evolution & Ecology, Genome Stability & Dynamics, Genomic & Computational Biology, Immunology, Membranes & Transport, Microbiology, Virology & Pathogens, Molecular Medicine, Neuroscience, Plant Biology, Proteins & Biochemistry, RNA, Signal Transduction, Structural Biology & Biophysics, Systems Biology

**Contact:** [courses\\_workshops@embo.org](mailto:courses_workshops@embo.org)

# 1. About

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The aim of an EMBO Global Lecture Course is to teach participants in eligible countries and territories outside Europe (B, C and D – see list on page 2), primarily PhD students and postdoctoral researchers. The course should provide participants with background and underlying concepts, thereby making the topic accessible to scientists with diverse scientific background.

The lecture courses can include up to 120 participants and last between three and ten days to provide sufficient time for discussion groups, poster sessions and journal clubs.

# 2. Funding

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The maximum funding available for an EMBO Global Lecture Course is €45,000 (€35,000 of core funding plus €9,000 exclusively for travel grants and registration fee waivers and €1,000 for childcare grants). It is expected that participants (other than the speakers) will pay for their travel, accommodation, and a modest registration fee.

## **EMBO funds can be used to cover:**

- travel (economy), accommodation and subsistence costs of the speakers;
- catering costs during the meeting;
- administrative costs up to €4,000 for in-person meetings and up to €8,000 for virtual and hybrid meetings;
- room hire, audiovisual and IT facilities essential for the course;
- social activities (e.g. excursions) expenses up to €3,000.

For hybrid meetings, an additional grant of €10,000 will be provided. The funds can be used to cover:

- Rental of a virtual platform to host the virtual part of the meeting;
- Rental of additional AV equipment and personnel costs;
- Additional administration costs up to a total of €8,000.

EMBO funds do not cover overheads or purchase of equipment. They cannot be used for gifts, honoraria, *per diem* expenses, poster prizes, or dinners/meals organised exclusively for speakers.

In order to reduce environmental impact, organisers are encouraged to consider distributing the abstract book in electronic format via the course website and to print only a minimum number of hardcopies, if necessary.

It is understood that, as an organiser, you do not render any services on behalf of EMBO. The organising institution is responsible for EMBO Global Lecture Course. It is supported by EMBO with a grant provided that the event is organised as described in the initial application (except for any further modifications that are subsequently approved in writing by EMBO), and that promotion of the event and submission of the final documentation complies with the funding conditions.

If you are holding your course in hybrid or virtual format, please refer to [Organising hybrid or virtual events](#) for a summary of options and points to consider.

Please inform us as soon as you have decided upon any changes to the original plans, via [courses\\_workshops@embo.org](mailto:courses_workshops@embo.org).

## 3. Payment of the grant

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The funds will be transferred to the account specified by you and to which you have access. EMBO will not be able to transfer the funds to 3<sup>rd</sup> parties. We recommend that you open a separate account, preferably at your institute, with the name of the course (but please do not use the term EMBO in the naming of the account, since this implies to our auditors that this account is managed by EMBO).

Approximately four months prior to the start of the course, 80% of the allocated funding will be transferred to organisers. EMBO must be notified of any significant changes to the course budget and/or scientific programme after it has been initially approved.

Once the final financial statement and reports have been approved by EMBO, the remaining funds (up to 20% of the allocated funding plus the amount spent on travel and childcare grants) will be transferred. Please list the travel grant recipients separately in the final report.

Since EMBO offers to set-up a website and registration system, design a poster and provide meeting bags and pens at no additional charge, any expenses incurred for these services will not be covered by EMBO funding and will be deducted from your final payment with the exception of the COMS payment service.

The final documentation has to be submitted to EMBO within three months following the end date of the course. Failure to do so will result in the final payment being forfeited.

EMBO reserves the right to claim unspent funds based on the financial statement.

## 4. Travel and childcare grants

Travel grants can be used to cover travel, accommodation, visa costs and/or registration fees. Organisers should announce the travel grants and registration fee waivers to participants in advance of the course, as soon as registration opens.

Organisers receive an additional €10,000 for their events to cover the following:

Type of grant	Amount allocated	Available for registered participants working in laboratories in	Explanatory notes
Travel grants and registration fee waivers	€2,500	All countries	Applicants should specify their needs in the registration form. Maximally €500 per participant can be allocated.
Childcare grants	€1,000	All countries	To cover additional childcare costs incurred by participants or speakers when participating at any EMBO-funded meeting including virtual and hybrid meetings. Eligible costs include fees for a baby-sitter or child-care facility, travel costs for a caregiver, or travel costs for taking the child to the meeting, etc. Applicants should specify their needs in the registration form. Maximally €500 per participant can be allocated.
Special travel grants & registration fee waivers	€3,000	Associate EMBC Member States (Chile, India, Singapore and Taiwan)	Exclusively for participants of any nationality working in laboratories in Associate Member States. Registration fee waivers and travel grants should cover the cost of attendance for participants who need it. Applicants should specify their needs in the registration form. Maximally €1,000 per participant can be allocated.
Special travel grants & registration fee waivers	€3,500	Croatia, Czech Republic, Estonia, Greece, Hungary, Italy, Lithuania, Luxembourg, Poland, Slovenia, and Turkey	Exclusively for participants of any nationality working in the countries listed. Registration fee waivers and travel grants should cover the cost of attendance for participants who need it. Applicants should specify their needs in the registration form. Maximally €700 per participant can be allocated.

Organisers may consider awarding fee waivers to applicants from lower income economies.

The EMBO travel grants shall be allocated based on the quality of the abstract submitted.

Please contact the eligible participants to offer them the grant or registration fee waiver and reimburse the recipients directly for their travel costs. It is the organiser's responsibility to select the awardees and directly reimburse them for their expenses as EMBO does not process reimbursements.

After your meeting, please provide us with the name, country of residence and amount awarded to each recipient as part of the final documentation you will send to EMBO. Please keep a copy of all participant travel receipts. We will reimburse you for the total amount of the travel and childcare grants along with the final payment.

## 5. Registration fees

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Organisers should keep in mind the VAT (Value Added Tax) in the country in which the course is taking place when setting the registration fees.

The registration fee for an EMBO Global Lecture Course:

- may be charged up to a maximum of €350 (< 5 days in length) and €500 (≥ 5 days in length) per academic participant, including accommodation.
- should be charged at a minimum of €1,000 for participants from industry, including accommodation.
- should be paid directly to the organiser (or the organiser's nominee) and included as income in the final financial statement. Please note that EMBO does not collect registration fee payments; however, fees can be collected via the website set up by EMBO (see [Registration Fee Collection](#)). The income from the registration fees is considered as EMBO funding.
- must be waived for one EMBO editor registered for the course (the editor will cover their own travel and accommodation expenses).
- may be waived for editorial staff from other scientific journals who attend the course.

Reduced registration fees can be charged to virtual participants. Discounts for group registrations should be considered.

## 6. Participants

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When selecting speakers and participants, organisers are requested to ensure gender balance. For EMBO Global Lecture Courses, a greater representation of scientists based in or close to the country where the course takes place is encouraged. Participants should not be restricted to pre-defined groups (whether this be from a single institute or other defined groups).

Participants can provide information regarding any special needs in the registration form. These may include any dietary requirements or accessibility needs. Organisers are please requested to accommodate these needs where possible. Should it not be possible to provide the requested services, please inform the applicants.

It is at the discretion of the organisers to define their own policies on participants using social media (e.g. Twitter) or taking photographs or recordings of presentation slides or posters during the meeting. Please inform participants of the policies that you would like to adopt via your meeting website and other communication channels. Also see the [Code of conduct](#) section below. This text will also be displayed on the website created by EMBO.

You may want to consider organising satellite meetings that are open to the local scientific community. You can apply for funding for up to €2,000 to organise a satellite meeting. The funding can be used to cover:

- Extra accommodation nights for speakers who are already participating in the EMBO-funded course
- Transportation for speakers to the satellite meeting venue
- Meals for speakers
- Audio-Visual for the meeting

If additional funds are necessary, please contact us via email at [courses\\_workshops@embo.org](mailto:courses_workshops@embo.org). Please note that the programme should indicate that the satellite meeting is supported by EMBO.

## 7. Alert for speakers

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Please note that speakers at EMBO Courses and Workshops have been contacted (via email or phone) by companies who wrongfully claim to be responsible for hotel and/or travel bookings and request credit card information. Please alert your speakers to this and inform them about the procedures you will use for the organisation of your meeting.

## 8. Lectures

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### [EMBO Young Investigator Lectures](#)

The EMBO Young Investigator Programme offers workshop organisers the opportunity to apply for support of a lecture to be given by an EMBO Young Investigator.

Please note that only current EMBO Young Investigators are eligible. A listing can be found on the [EMBO website](#).

Maximum funding: €800 (within Europe) and €1,200 (outside Europe).

Please complete the [application form](#) and send to the EMBO Young Investigator office ([yip@embo.org](mailto:yip@embo.org)).

### [EMBO Science Policy Lectures](#)

The EMBO Science Policy Programme offers workshop organisers the opportunity to include a non-scientific talk from a scientist, sociologist, ethicist or journalist.

The lecturer must hold a presentation on 'Science Policy' issues.

Maximum funding: €1,000 (within Europe) and €2,000 (outside Europe).

Please complete the [application form](#) and send to the EMBO Science Policy office ([policy@embo.org](mailto:policy@embo.org)).

### [EMBO Women in Science Lectures](#)

EMBO offers workshop organisers the opportunity to include a talk addressing issues related to women in science.

The lecturer must hold a presentation on 'Women in Science' issues.

Maximum funding: €800 (within Europe) and €1,200 (outside Europe).

Please complete the [application form](#) and send to the EMBO Women in Science ([women@embo.org](mailto:women@embo.org)).

## 9. Poster Prize

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EMBO Press offers a limited number of poster prizes each year. If you would like to request a poster prize for the course please contact [publishing@embo.org](mailto:publishing@embo.org).

EMBO core funding cannot be used to cover poster prizes.

## 10. Publicising and co-funding

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The course will be entitled "EMBO Global Lecture Course". The (main) title of the course may not mention other organisations or institutes that support the conference. Organisers should also refrain from using excessively long titles and numbers referring to previous meetings.

The website, poster and all materials should include the [EMBO logo and the EMBO Global Lecture Course](#) stamp. The EMBO Press logo should be featured with other supporter logos on the website and poster.

Sponsors cannot be mentioned in the title of the meeting but can be acknowledged on the website and the poster. Sponsors who provide €20,000 or more towards the meeting can also be recognized as co-sponsors. The co-sponsors' logos can be displayed prominently on the website.

EMBO does not consider funding courses when the other co-funder/sponsors insist on the proceedings being published (although publications can arise from EMBO Global Lecture Courses, provided that all contributions are given voluntarily).



All EMBO Global Lecture Courses are advertised on the EMBO poster, EMBO website and social media channels and through selected other print and online media.

Further advertising is left at the organiser's discretion. It is a strict condition of EMBO funding that any additional publicity, as well as the programme and abstract book, should clearly indicate that the meeting is an EMBO Global Lecture Course, without subtitles relating to previous similar meetings or other organisations.

The scientific programme of your meeting, as submitted at the time of application, was reviewed and approved by the EMBO Course Committee. Responsibility for subsequent changes to the programme, and the organisation and execution of the event, lies exclusively with the event organisers.

Organisers shall comply with all applicable laws and regulations, standards and guidelines, including the European General Data Protection Regulation ([GDPR](#); see also [Data protection](#) below), in the advertising of an EMBO funded meeting. Organisers shall also ensure that all processes and procedures used relating to the organisation of the meeting comply with all local laws, regulations, standards and guidelines that apply in the jurisdictions in which the meeting takes place.

## 11. Poster and website

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EMBO will create the course website (including an online registration system), design a poster and abstract book cover at no additional charge where organisers opt for this. EMBO hosts the website but does not take responsibility for the content provided by the organisers of the meeting. Organisers are responsible for ensuring that all content and images provided by them for the websites and posters comply with German copyright laws. Fines resulting from copyright infringement will be the organisers' responsibility and will be deducted from the final payment of the awarded EMBO funding.

For information on various methods of collecting registration fees, please see [Registration Fee Collection](#). Please note that EMBO does not handle registration fee payments, but only provides information that may be useful to organisers.

Please note that EMBO does not print or mail the posters or abstract books designed for your course.

Organisers who make their own websites and posters have to adhere to the EMBO brand guidelines (please refer to "[Guidelines for organisers creating their own web pages and posters for EMBO Courses or Workshops](#)").

Full details will be supplied to organisers shortly after acceptance of the funding conditions has been confirmed.

# 12. Code of conduct

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At EMBO, we believe that harassment and discriminatory behaviour are unacceptable in any setting. This code of conduct will be applicable for all participants of EMBO events and will be published on the website of your course.

We know that individual communities will have different ways to deal with the use of social media and data communication. You may want to edit and adapt the policy on media and communication as appropriate and agreed to by your community.

Please find below a general code of conduct for your EMBO Global Lecture Courses.

## **Anti-harassment and non-discrimination policy**

This EMBO meeting shall maintain an environment free of harassment and discriminatory behaviour for everyone, regardless of gender, gender identity and expression, age, sexual orientation, disability, physical appearance, ethnicity, beliefs (religious or otherwise) or manner of articulation.

Harassment and discrimination of attendees in any form, either in person or online is not tolerated.

Attendees are expected to conduct themselves in a professional manner and all communication and behavior should conform to a respectful environment for all.

## **Media and communications policy (*adapt as appropriate*)**

Unpublished data may be presented at this meeting and presenters may not want their results to be communicated beyond the audience in attendance at the event. Participants must seek approval from the presenter before quoting or passing on any of the data presented.

Furthermore, the recording or communication of the scientific content presented (e.g. talks, discussion sessions or posters) by audio, video, photographs or any other means, or communication via social media needs to be agreed upon by all concerned.

Attendees violating this Code of Conduct may be asked to leave the workshop, practical course or lecture course without a refund at the sole discretion of the organisers.

Attendees are expected to respect the media and communications policy during this EMBO event.

# 13. Reducing the CO<sub>2</sub> footprint

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EMBO would like to promote the reduction in CO<sub>2</sub> emissions in order to lessen environmental impact by encouraging the organisers to implement, to the best of their abilities, some measures that should keep the CO<sub>2</sub> footprint of the course at a minimum.

We are aware that these measures may neither seem nor be significant on their own, but we do hope that they will create awareness and will help to change many people's minds and behaviours. Only together can we make a difference to the climate and the future of the planet and our children. We would therefore welcome that organisers encourage debate about this topic at the meeting.

**Reducing long-distance air-travel:** It is recommended to include at least one remote presentation at the meeting. This should not be given by an additional speaker, but should replace a regular speaker in your programme. The money saved for travel and accommodation (max. €1,500) as a result can be used to cover additional travel grants for participants from the available core budget.

**Provide catering with lower CO<sub>2</sub> impact:** Serve vegetarian food preferentially and reduce meat options from the meals. You might consider the following:

- On at least one day of the meeting only vegetarian food is served.
- Catering should be served in non-disposable wares.
- If possible, try to avoid (plastic) bottled water and plastic cups.

**Electronic programme and abstract book:** Organisers should distribute the abstract book in electronic format via the course website and to print only a minimum number of hardcopies, if necessary. Via the EMBO provided registration system organisers can export the abstract book in electronic format. This can then be made available, password protected, on the course website.

**Voluntary CO<sub>2</sub> compensations:** Organisers may consider collecting voluntary CO<sub>2</sub> compensation payments from participants and donate to accredited compensation brokers.

**Central locations:** Consider venues that are centrally located and easily accessible by public transport.

**Plastic-free badges:** Organisers should consider using paper badges.

**EMBO promotional items:** EMBO provides notebooks (FSC certified paper), bags (from recycled materials), and pencils for meetings on request. Notebooks are perforated to encourage their continued use after the meeting. You will be contacted prior to the meeting to inform us of your needs.

# 14. Participant feedback

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If EMBO creates and hosts the website for the course, feedback from all participants is automatically collected after the meeting. Participants who fill out the questionnaire automatically receive their certificate of attendance via email. Organisers will have access to the anonymised feedback forms.

Should you be using your own registration system, EMBO will request a complete list of participants, including speakers. They will be contacted by EMBO with the request to fill out the feedback questionnaire. Organisers will have access to the anonymised feedback forms.

# 15. Data protection

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Since EMBO Global Lecture Courses include speakers and attendees from Europe, you have agreed to comply with the European General Data Protection Regulation ([GDPR](#)). Under the GDPR, you hold the position of “data controller”, meaning that you are the decision-makers regarding the personal data that is collected and processed for the organisation of your event. As a data controller, you must familiarize yourselves with the GDPR and your obligations to your data subjects. Specifically, you must agree only to collect personal information that is necessary for organising your meeting and ensure that the people whose information is collected are aware of the ways in which it will be used. Any person whose personal information (including names, email addresses, institutional addresses etc.) is to be used in the promotion of the meeting must explicitly agree to their information being used in this way. You must also ensure that subjects are aware of [their rights under the GDPR](#), including the right to be made aware of the data you hold about them and to correct, erase or receive a copy of this data.

An appropriate disclaimer informing users of their rights under the GDPR will be included in all online registration systems supplied by EMBO. If you are not using the websites or registration platforms provided by EMBO, it is your responsibility to ensure that the participants are made aware of their rights.

If you are planning to contact event participants after your course, you must obtain their active consent during the event (e.g. through a sign-up list). Please be aware that under the GDPR, you have an obligation to document that they have given this consent, so please keep the corresponding documentation.

# 16. Final documentation

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- A short report (1–2 pages) about the course, including a short scientific overview, participants' reaction to the location and organisation, and any other relevant comments.
- Final financial statement, which should include all income and expenditure for the course. Please note that the organiser must retain receipts for ten years after the course for auditing purposes.
- Total number of applicants, and the number, gender, nationality and country of residence of academia & industry participants, and of instructors and speakers.
- Programme and abstract book (preferably electronic).
- If applicable: List of travel grant, childcare grant and registration fee waiver awardees, including name, institute, nationality (if known), country of residence and amount awarded for travel and childcare grants. Please note that the organiser must retain receipts for ten years after the course for auditing purposes.

**All above documentation must be submitted to EMBO within three months following the end date of the course. Failure to do so will result in the final payment being forfeited.**

# 17. Additional guidelines for EMBO | The Company of Biologists Lecture Courses

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EMBO | The Company of Biologists Lecture Courses are meetings taking place in countries eligible for co-funding by EMBO and The Company of Biologists (D – see list on page 2).

The following additional guidelines apply:

- The website and poster of the course will be designed by EMBO.
- The organisers should acknowledge EMBO and The Company of Biologists in equal measure in all materials produced.
- Any use of The Company of Biologists' name and logo shall be in accordance with the brand guidelines of The Company of Biologists, which is sent as a separate document.
- Organisers authorize EMBO to provide to The Company of Biologists the following documents:
  - a copy of each successful application, where funding was approved by EMBO; and
  - a copy of the final documents submitted by organisers to EMBO

- Organisers shall allow a representative of The Company of Biologists to attend each meeting for the purpose of writing reports that The Company of Biologists may publish on its websites or in its journals, in such form as it may determine at its sole discretion.

## 18. Registration Fee Collection

This brief overview is intended to provide information on the possible avenues for setting up a payment system for your EMBO funded event.

You may want to get advice regarding tax implications of your meeting. These may arise for example from collecting registration fees, sponsorships etc. These implications may differ between the place from which you organize the event and where the event is taking place.

Please note:

- EMBO does not recommend or guarantee the services of any of these providers.
- EMBO does not offer to set up or provide support in the use of these services—questions about the platform and how to work with it should be directed to the support services of the respective providers.
- Some services charge a commission for the transaction of each payment. You should check the amount of the fee and consider whether to adjust your pricing accordingly.

<b>Payment module via EMBO supplier</b>	<b>Online transactions (PayPal, Stripe, WorldPay etc.)</b>	<b>Bank transfer</b>
Can be used with a standard checking account.	Requires that you have a business bank account.	Requires that you have a business bank account.
The registration system matches the payments to the participants.	Payments and participant registration have to be manually matched.	Payments and participant registration have to be manually matched.
Credit card payments are possible.	Credit card payments are possible.	Credit card payments are NOT possible.
Included with the EMBO website, but not set up by EMBO.	PayPal and other online payment services generally charge a commission for each transaction.	There may be additional charges for international transfers.
For set up and support, please contact: <a href="mailto:m.mandl@conference-service.com">m.mandl@conference-service.com</a>	For support, please contact your service provider. For a brief tutorial on how to use PayPal for online payments, please see <a href="#">here</a> .	For support, please contact your bank.

## IMPORTANT

**Please note that your chosen payment provider may not be available in all countries and may not accept all credit cards, debit cards, or payment methods. EMBO cannot help with any problems relating to the platform you use.**

**Please also note that only the payment module via the EMBO supplier will allow for matching the payments with the registrants' data. For all other methods of accepting registration fees, you will need to manually match the payments with the registrant's data.**

# 19. Organising hybrid or virtual events

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## 19.1. Hybrid conferences

We understand hybrid conferences as an in-person conference with a virtual component.

The simplest format is an in-person conference where the talks are streamed to registered virtual participants, or alternatively, the talks are recorded and made available to the virtual participants after the talk. The latter has the advantage of allowing participants in different time-zones to watch the talks at a convenient time.

With little extra effort, virtual participants can be included in the Q&A sessions via the chat options offered by most virtual streaming platforms (e.g. Zoom, Cisco Webex, Vimeo, YouTube Live and others).

Virtual participants could also give short talks based on the abstracts submitted. Sufficient time needs to be allocated in the programme to accommodate the switch between virtual and on-site speakers. Virtual speakers should be encouraged to present live but in case of technical issues, it is recommended that they provide pre-recordings of their presentations.

Social networking platforms, such as Wonder.me, Gather.Town, SpatialChat, Topia and others allow participants to meet in virtual space. According to our survey, respondents felt that, if attending the conference in person, they might not have time to join any virtual social networking event. On the other hand, virtual participants may find the opportunity to virtually meet with other (virtual) participants useful.

Some of our hybrid conference organisers have experimented with virtual poster sessions, i.e. in-person and virtual participants met in virtual space to discuss their posters. This can be done e.g. by using Gather.Town, Wonder.me, Remo or individual Zoom break out rooms for posters. In practice, this requires that the in-person participants find a quiet space (either in the venue or in their hotel rooms) to join the virtual poster sessions.

An alternative may be to hold separate poster sessions for in-person and virtual participants, and/or to hold a virtual poster session before or after the meeting for all participants.

Another option is to ask all poster presenters (virtual and in-person) to upload their posters on the meeting website (e.g. Whova, an all-in-one solution; figshare [for data sharing only]). Selected virtual poster presenters can also be invited to give flash talks as part of the programme.

Prepare all poster presenters on how to present their poster in the chosen platform.

See more suggestions below in the How To section under “Virtual Conferences”.

### **Technical requirements:**

Taking an in-person conference into virtual space requires technology in addition to the usual AV equipment:

1. A virtual platform that allows access to the talks for virtual participants.

This could range from a simple webpage with links to the talks to a sophisticated platform with a chat, forum and other features.

EMBO can offer a simple conference webpage with links to the video stream. This is based on the webpage that EMBO provides to course organisers.

Otherwise, organisers of EMBO Courses and Workshops can choose a platform of their liking (including the virtual EMBO platform). Platforms that have been used by recent EMBO hybrid meeting organisers include Gather.Town and Whova (the latter also doubles as a meeting app for on-site participants).

2. A licence for streaming software (e.g. Zoom, Cisco Webex, YouTube Live, etc.)

Organisers of EMBO Courses and Workshops can choose the software of their liking.

3. Cameras, microphones, audio mixer(s) and on-site technical equipment to provide sound and video to the virtual participants.

It is recommended to select a venue that provides these services or to arrange this with the venue and hire the necessary professional equipment and technicians. Organisers should have a clear idea of what they want and discuss the possibilities with the technicians. AV technicians may not be familiar with the specific requirements of scientific meetings, a thorough briefing may be necessary. Points to consider are:

- For optimal engagement, the video streamed to the virtual participants should switch views between presentation, speaker and the audience.
- During Q&A sessions, the audience needs to use microphones, so that questions are audible for the virtual participants. A camera filming the audience during Q&A sessions is helpful.
- When recording talks for later viewing by the virtual participants, make sure that you have software that supports the recording and that sufficient storage capacity is available. It is important to upload the talks as soon as possible after their live recordings, so that participants in other time zones have timely access to them.
- Conventional laser pointers used by speakers will not be visible to the virtual audience. Digital laser pointers are visible for both virtual and on-site audiences.

The EMBO grant can be used to pay for these services.



### **Personnel requirements:**

In addition to the on-site arrangements, organisers need to consider the administration of the virtual side.

Apart from the technical and personnel requirements described above, an additional chairperson will be needed during the sessions to monitor the questions from the virtual audience.

### **Speakers:**

A major reason why scientists attend conferences in-person is the opportunity to personally meet (prominent) speakers in their field. It was expected that speakers listed would also be present on-site to deliver their talks, even if some may not have stayed the full duration of the conference. In the future, this may change. Individual speakers may not be able to attend in person and may be invited to make their contribution virtually.

Another consideration is the carbon footprint resulting from long-distance travel, which may be reduced by asking a speaker from overseas to present remotely.

Organisers should agree on a clear policy on remote speakers and make it absolutely transparent to the participants prior to registration who of the invited speakers will be on-site and who will speak remotely.

Prior agreement from speakers for the streaming of their talks, and possibly recording for later viewing by the participants, has to be obtained. The virtual audience needs to be informed if a particular talk will not be available to them.

### **Virtual participants:**

There are many reasons why participants may not be able to attend a meeting in person, these include:

- Health reasons
- Care requirements
- Lack of funding
- Difficulty to obtain a visa

amongst other possible reasons.

Offering participation via virtual streaming of talks will allow these scientists to learn about the latest developments in their field despite these restrictions.

An upper limit to the number of virtual participants will be set by the streaming licence purchased, but organisers might want to take other aspects into consideration.

Please note that recorded talks may be essential for virtual participants in other time zones, as they may not be able to participate in the live sessions.

### **Registration fees for virtual participants:**

Registration fees charged to on-site participants cover part of the costs of the conference, such as venue rental, meals and speaker costs. Since the delivery of the virtual component requires significant finances, charging a reasonable fee to virtual participants is fully justified.

Registration fees charged to virtual participants should be lower than on-site fees and may be waived for participants under certain conditions (e.g. for participants from low income countries). Group fees for multiple participants from individual labs or institutions should be considered.

### **Transparency:**

Organisers should clearly specify how the conference will be run and what virtual and on-site participants can expect. This should be detailed on the website of the meeting and should include information on what is available for virtual participants, e.g.

- Access to talks (specify which talks are not streamed) and if as well as which talks will be recorded and available on demand. Specify when the talks will be available and for how long (if applicable)
- Participation in a Q&A session, via virtual platform or other means (e.g. via chat, meeting forum, email, Twitter) (if applicable)
- Participation in discussion sessions or other on-site sessions and activities (if applicable)
- Abstract submission (if applicable)
- Selection for short talk/flash talk (if applicable)
- Participation in (virtual) poster sessions (if applicable)
- Means of communicating with other participants, either virtual or on-site, via chat, a meeting forum or other (if applicable)

Potential in-person participants should be able to see from the website which speakers will not be present in person prior to registration.

### **Venue:**

Chose a venue that has experience in hosting hybrid meetings.

### **Code of conduct:**

Organisers should have a code of conduct for virtual and on-site participants, a policy regarding data protection (both participants' personal data as well as the scientific data presented) as well as specifying the use of social media during the meeting.

Participants should agree to these upon payment of registration.

## **19.2. Virtual conferences**

Purely virtual conferences require careful preparation. The “conventional” in-person meeting programme that we are used to, frequently lasting more than 12h per day, cannot be transferred one-to-one to virtual space. A virtual meeting should not be as long and intense per day as an in-person meeting. This may mean that the meeting may stretch over more days, has shorter presentations or fewer speakers. This may also result in fewer topics to be covered. The length of the scheduled breaks can be seen as a compromise between allowing people to have bathroom, coffee or meal breaks versus losing them to other activities.

See in the above section on technical requirements about suggestions regarding virtual platforms.

## 19.3. Suggestions for organisers

Here are some suggestions on how to deal with more specific issues that you may be faced with when organising a virtual/hybrid meeting.

How to address the **lack of rapport** between speaker and the audience during the talk in a virtual meeting:

- Use a platform that allows the speaker to see, for e.g., the chair, or a panel of session organisers.<sup>1</sup>
- Have all session speakers (and chairs/organisers) meet in a session<sup>2</sup> before going live to make them feel comfortable and get to know at least some of the audience. This is particularly important for short talk speakers and flash talk speakers who may be less used to speaking in an online format.
- Play artificial applause audio clips at the end of the talk.<sup>3</sup>
- Have a poll running visibly during the talk (of course not to be addressed by the speaker during the talk, but visible evidence for reactions to the talk).
- Encourage participants to show virtual reactions (clapping hands, thumbs up etc.)
- Q&A sessions can also help improve the rapport with the audience (see suggestions below).
- If the speaker wants to see the participants or the chair while presenting, they should be advised to use two screens for a more comfortable experience.

How to run **Q&A** following a talk or a session in a virtual or hybrid meeting:

- Sessions should be moderated by a chair who selects the questions.
- Questions could be upvoted by participants.<sup>4</sup>
- Live questions where the moderator preselects the questions and opens a channel for the question to be asked live can make the talk more interactive.<sup>5</sup>
- Collect all incoming questions in the poll/chat/Q&A of the platform or directly in e.g., a Slack or Jitsi channel, and ask the speaker to answer them in writing during the course of the meeting. The collected questions could be downloaded and posted on for e.g., a dedicated Slack/Jitsi channel so that the answers are visible to all participants.
- Place speakers in breakout rooms and have live discussions with the participants after the talk. You may consider grouping the speakers to prevent that less popular speakers are alone in their breakout room.<sup>6</sup>

How to **facilitate networking** at a virtual or hybrid meeting:

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<sup>1</sup> For e.g., Zoom Webinar mode offers this function.

<sup>2</sup> For e.g. The practice session in Zoom Webinar allows for this, also enable the waiting room so that participants are allowed to enter when all panelists are ready and comfortable to go live.

<sup>3</sup> Some CC0-licensed (free to use for any purpose, no attribution required) sounds can be found here: <https://freesound.org/search/?q=clapping&f=license%3A%22Creative+Commons+0%22&s=score+desc&advanced=0&g=1>

<sup>4</sup> Zoom, Slido, Pathable, Glisser are some of the platforms that allow for this.

<sup>5</sup> For e.g. Cisco Webex and Webex Webinars and Zoom Webinar, more info also at [12 Steps to a wildly successful webinar](#)

<sup>6</sup> A comparison between Zoom Meeting and Webinar features can be found here: [Zoom Meeting and Zoom webinar comparison](#)

- Organise speed networking events in breakout rooms.<sup>7</sup> These could also be arranged using keyword matches of participants.<sup>8</sup>
- Meet-the-speaker sessions in breakout rooms with all participants visible. These could be organised to meet different requirements, for e.g., restricted to junior participants to allow for juniors to ask questions, or one for speakers and group leaders only, etc.
- Organise thematic breakout rooms (select a discussion leader or host to kick off the discussion). The themes could e.g. be scientific, technical, political, or career advice related.
- Organise mentoring sessions for junior scientists with an appropriate host.
- Facilitate/encourage one-on-one virtual meetings via your platform or ask participants to indicate their means of virtual communication.<sup>9</sup>

How to deal with **time-zone** differences:

- Record talks for re-viewing at convenience
- Restrict virtual meetings to half days
- Indicate local times on the virtual platform

How to run **virtual poster sessions**:

- Posters, possibly including a short presentation, can be uploaded on free<sup>10</sup> or commercial<sup>11</sup> platforms.
- Reserve specific timeslots for poster sessions, like in live poster sessions. Poster sessions can be organised in breakout rooms, where each poster presenter has their own breakout room during the poster session. Encourage (require) presenters to be “at” their poster at the specified times.
- Hold at different times of the day to accommodate different time zones.
- Organise flash talk sessions to allow poster presenters to introduce their poster during regular meeting times. These could be pre-recorded to minimise technical problems.
- If the platform does not provide one-on-one live meeting function, encourage poster presenters to publicise their own channel (e.g. Zoom [free for 40 minutes], Skype, etc.), so that those interested in talking to them can do so.

To address **screen fatigue** during virtual meetings:

- Restrict meeting duration per day to 0.5 days
- Maximum meeting length of 3–4 days
- Add adequate breaks, for e.g. 10-15 min between sessions or talks; 45 min to an hour for lunch

***Disclaimer:** This document is intended to assist organisers set-up virtual meetings and offers merely suggestions and advice. EMBO does not endorse any software or services and does not take any responsibility for third-party services that the organiser may choose to use.*

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<sup>7</sup> Some popular platforms for these include: Wonder.Me, Zoom, Remo, Gather.Town, SpatialChat

<sup>8</sup> Some software allows this includes [Grip and Brella](#)

<sup>9</sup> Some platforms allow one-on-one calls e.g., Pathable, Engagez, Slack with license, etc.

<sup>10</sup> For e.g., figshare, SlideShare, scribd.com, prezi.com, speakerdeck.com

<sup>11</sup> For e.g., ipostersessions.com, confex.com, posterpresentations.com, <https://lp.fourwaves.com/virtual-poster-sessions>, <https://gather.town/>