

CAS Best Practices Guide

Covid-19 Considerations

Navigating the virtual format

Although the virtual format can create some new challenges, many workshops have reported that this format allowed them to increase their number of attendees! Zoom is the most common platform for holding virtual meetings. Others include Google Meet, Skype, and Microsoft Teams.

Adapting to the virtual format

Running the Q&A

- Appoint a meeting moderator. This can be the workshop coordinator, a faculty member, or a volunteer.
- Keep everyone muted until it's their turn to speak. The meeting host can choose to mute everyone automatically on Zoom.
- To avoid people interrupting each other, ask participants to use the "raise hand" feature, and unmute them when it's their turn to ask a question.
- You can also use the chat feature. Participants can either post questions publicly or send them privately to the moderator, allowing the moderator to choose which questions to ask in which order.

Outside attendance

- Some workshops allow people outside UChicago to attend meetings. Other workshops might limit attendance to students and faculty affiliated with UChicago. Whatever your choice is, announce it when you send out the meeting information and set up the meeting accordingly.

Getting people to present

- Some presenters may be reluctant to present online. To encourage students to present, you can:
 - Ask a few students to give shorter presentations during the same meeting.
 - Commit to allow them to present again.
 - Remind them of the benefits of virtual meetings, (e.g. a higher number of attendees).

Strategies for combating Zoom fatigue

You can:

- Shorten meetings.
- Distribute material in advance (presenter's paper or slides, for example), so there's less pressure to concentrate during the presentation.
- Schedule fewer meetings.
- Meet only for Q&A/Feedback:
 - Replace the presenter's presentation with written material or, if the presenter is willing, have the presenter do an asynchronous presentation

Food, Beverage, Travel Guidelines

Please refer to the guidelines that were emailed to you concerning these items.

Faculty Sponsor Guidelines

The main goal of CAS workshops is to provide a forum for graduate students to present their research, facilitate the dissertation-writing process, and create opportunities for professionalization and mentorship. To this end, faculty sponsors are encouraged to work in tandem with student coordinators throughout the quarter to develop and sustain these learning spaces. Making decisions regarding the workshop is primarily the responsibility of the graduate student coordinators, not the faculty sponsors, as serving as a workshop coordinator is meant to help the graduate student's professional development. That said, mentorship by faculty sponsors throughout the year is also a vital and highly appreciated aid to the student coordinator's successful running of the workshop.

Responsibilities of Faculty Sponsors

- Complete the CAS application along with the outgoing student coordinator. Download available [here](#).
- Share with both the outgoing and incoming student coordinators the budget assigned by CAS.
- Confirm the name of and contact information for the incoming student coordinator for the upcoming academic year with CAS.
- Commit to attending and actively participating in workshop sessions as consistently as possible.
- Familiarize yourself with the responsibilities and expectations of student coordinators so as to avoid making requests the coordinators are unable to accommodate.

Responsibilities of Student Coordinators

- Communicate expectations, plans, and any potential problems to your faculty workshop sponsor(s) as early in the year/quarter as possible so that they are able to perform their

responsibilities as faculty sponsors. This also ensures that you as a coordinator are able to make the most of the mentoring experience.

- Attend the orientation session with CAS officials.
- Invite speakers to the workshop, coordinate their visits, and work to create opportunities during the visit for mentorship between students and faculty.
- Invite graduate student presenters. At least 2 students must present each quarter, and at least a third of any given quarter's presenters must be students.
- Complete the quarterly participation report at the end of the quarter. *If this is not completed on time, the student coordinator's stipend will be delayed.
 - The report must include the name of faculty in attendance, the number of students attending, and the numbers of presentations by students, faculty, and invited speakers.

Spending guidelines

- A workshop cannot spend more than \$200 per honorarium (even in joint meetings, \$200 is the maximum amount that may be offered).
- Reimbursements must occur within 30 days of expense.
- Flights/train tickets must be coach/economy class to be reimbursed.
- *Covid-19 rule: Required approved in-person meeting, and travel exemption.

Budgeting and Scheduling

Calls for Abstracts

- Most workshops issue calls for abstracts on either a yearly or quarterly basis.
 - In either case, calls for abstracts should be issued well in advance of the start of the period to be scheduled to allow sufficient time both for submission of abstracts and for planning the schedule.
 - Please include a request for keywords in your calls for abstracts. CAS interns add these keywords to event descriptions on the shared CAS calendar.
- If your workshop does not receive enough student submissions*, it may be useful to send personal invitations to students you know who are working in areas related to your workshop. For many workshops, this approach can yield better results than a general call for abstracts on its own.

*Remember that you need at least 2 student presentations per quarter, and at least $\frac{1}{3}$ of the total presenters should be students.

Budgeting

Expenses eligible for reimbursement

- Invited speakers:
 - Flights/trains/buses (only coach/economy class)
 - Gas
 - Hotels
 - Meals
 - Taxis/transportation within the city
 - Honorarium (\$200 max per speaker)
- Food
 - Snacks
 - Catered food for an event
 - Individually wrapped food and snacks recommended.
 - Lunch/dinner with invited speakers
- Covid-19 rules:
 - Required approved in-person meeting, and travel exemption.

General Recommendations

- Come up with a **general plan** for the year's budget at the start of the academic year.
 - Consider major expenses first and then work out how much you can afford to spend per workshop.
 - How many speakers are you inviting throughout the year?
 - Will you be arranging a mini-conference?
 - How much should flights, hotels, event catering, dinners for invited guests, etc. cost?
 - Will you be offering honoraria?
- Reach out to Sandra Jackson (cas@uchicago.edu) to get hotel and flight details.
- When booking flights, you have two options (B is often the cheaper option):
 - Option A. Speakers purchase their own tickets.
 - Option B. Your workshop buys the tickets for them via Sandra Jackson. Do not buy the tickets with your own funds.
- If you're organizing lunch/dinner with the invited speaker:
 - Set an estimated budget for that event and make a plan regarding how you are going to keep to that budget. Remember to budget for transport, tips, drinks, etc. Reach out to Sandra Jackson for a tax free form to take with you to the restaurant.
 - Remember that these events are designed to benefit graduate students; be sure to balance the number of students and faculty that attend these events.
 - Take note of all the attendees (you'll need this info for reimbursement)
 - Use a faculty's GEMS card if possible to avoid paying out of your own pocket.

Inviting Speakers

Inviting outside speakers can greatly enhance a workshop. Choosing the right speakers can increase the workshop's audience, allow the workshops to function as important social events for attendees, and introduce attendees to important faculty in their fields. This is also a great opportunity for networking.

- When choosing outside speakers, take into consideration the interests of the students and faculty who usually attend your workshop.
 - For instance, you can survey the usual attendees to have a better idea of who they might enjoy as an invited workshop speaker.
- Although you might have other sources of funds to pay for more invited speakers, remember that workshops are not meant to be just a speaker series.
- It's a common practice in some fields to ask speakers to have one-on-one meetings with members of the department during the day of their visit.
 - Communicate your plans to the speaker when you invite them, in order to set clear expectations.
 - Remember to prioritize meetings with grad students.
 - Ask people in advance about whether they would like to attend one-on-one meetings so that you have a better idea of how many meetings you'll need to schedule.
- It's a good practice to send the speaker their schedule in advance. Try to be as specific as possible, including times, names and locations. It might be useful to give specific instructions on how to get to certain buildings/offices.

Setting the Schedule

Time and day

- Try to meet on a regular basis, at the same time each week.
 - If you need to schedule a meeting at an exceptional day/time, be sure to communicate that clearly.
- Try to choose a day/time that doesn't conflict with other relevant CAS Workshops or relevant grad courses/classes.
 - If conflict with other relevant CAS workshops is inevitable, you can alternate weeks (e.g., odd weeks for Workshop A and even weeks for Workshop B).

Number of meetings

Workshops should meet on a regular basis. Aim for 4-7 meetings per quarter and communicate with the faculty sponsors before scheduling in case there are any time conflicts.

Joint meetings with other CAS workshops

Check the list of CAS Workshops to find possible collaborators. Remember you can split expenses for joint meetings (although honoraria are capped at \$200, even for joint meetings).

Student/faculty balance

Workshops are required to host at least 2 student presentations per quarter, and at least $\frac{1}{3}$ of the total number of meetings should feature student presenters.

- The ratio of student: faculty presentations is important for your workshop's future funding, so pay attention to this as you schedule your workshop.

Timing Major Events

When inviting speakers or organizing conferences, consider what other events will be on campus or in the Chicago area, and whether they will conflict with your event and limit your event's audience. Be sure to avoid scheduling meetings during annual conferences your regular attendees may wish to attend.

Website

Update your workshop's webpage with your schedule on a quarterly basis.

- Event listings should include the event's date and time, location, title, presenter, and a brief description.
- If there is material to be read in advance, it should be accessible via the website.
- If there are any events for which these details are not settled by the start of the schedule, be sure to update them as the quarter proceeds.

Publicizing the Schedule

- Send an email to your listserv and other relevant listservs with your schedule for the quarter (e.g., your departmental listserv).
- (In non-pandemic times) consider posting a flyer version in your home department if the workshop is likely of interest to many in the department.
- Keep your website updated. This allows people to retrieve information without needing to email you or your faculty sponsors.
- If you think that your workshop could benefit from more faculty participation, you can send a personal invitation to the relevant faculty members.

Running a Successful Workshop

The Basic Workshop Format

Most workshops, much like a classroom seminar, are built around a formal or informal presentation that is either followed by a Q&A session or designed for simultaneous Q&A. If there are two speakers presenting in a single session, it is best to have the presentation and questions for one speaker in the first half of the meeting, followed by the presentation and questions for the second speaker during the second half of the meeting. This allows each speaker to receive the same amount of time and separates the presentations so that each speaker is able to receive the attendees' full attention.

Presentation

- The nature of the presentation can vary based on discipline. The general structure is for speakers to present their work with a focus on the areas that could use feedback. Presentations generally last anywhere from 15 to 45 minutes and may or may not include audio/visual aids.
- Presentations can range from finished projects to work in progress, or even data discussion. Making clear that the presentation doesn't need to be part of a finished project can relieve some pressure from students, who may be reluctant to present in the earlier stages of their research.

Audio/visual aids

- If a presenter is using slides, make sure to have everything necessary to make them work.
 - For example, is the presenter expected to use their own laptop? If this is the case, communicate this clearly with the presenter.
 - If you need an adapter, you can ask the presenter to bring their own (if they're using their own laptop), or you can provide them one. You can borrow some for free at AV Services (avs@uchicago.edu or 773-834-4499), located in the basement of Stuart Hall.
- If a presenter is using handouts, communicate with the presenter ahead of time to arrange the distribution of the handouts.
 - Is your workshop in charge of printing the handouts? If so, ask the presenter for handouts in advance so you have time to print them and make them ready for the presentation.
- If a presenter is planning to share audio or video clips during the presentation, be sure to test the A/V systems before the workshop begins.

Moderator/chair

- It is useful to have someone in charge of hosting and moderating the session.
- Moderators can be student coordinators, faculty, or volunteers, and their tasks could

include introducing the speaker, keeping them in check for time, and queuing the questions.

- This helps the speaker focus on the presentation and the feedback without the stress of adjudicating between members of the audience.
 - It is best to have a regular moderator for the sessions to have a consistent practice over the course of the quarter for all frequent attendees.

Q&A

- The Q&A can occur during or after the presentation.
- There should be a respectful way to signal to the moderator or the speaker that a question needs to be asked to avoid an outright interruption.
 - Moderators can enforce a hand raising procedure and be the one to call on attendees.
 - This helps keep order and focus the attention of not just the speaker, but also of the other attendees on the single questions at hand.
- If the Q&A occurs after the presentation, the moderator can collect a written list of the hands raised by the audience and call on them in order. By having a running list with questions, attendees can focus on the speaker's answers, instead of vying for attention to get their questions asked.
- A useful way to create a conversation is to establish a system whereby attendees can signal whether they have a new question or if their question contains a follow up response or question to a previous question.
 - One suggestion is to have one finger raised to signal that it is a new question, and two fingers raised to signal that the question follows on a comment/question that was just made/asked. This helps focus the discussion by keeping all the questions on the same topic at the same time, and avoiding jumping around on issues.
- Sometimes the balance between faculty and students' questions is an issue
 - Some strategies: (i) set a rule by which questions by students and questions by faculty should alternate; (ii) set a rule by which the first 10/15 minutes of the Q&A period will focus exclusively on students' questions; (iii) if you collected all the hands raised, you can name people to ask their questions to create a balance.

Alternative Formats

Reading groups

- Choose one paper or set of papers (or book chapter/s, etc.) and meet to discuss it/them.
- Pick one discussion leader who can summarize the main ideas of the paper and facilitate the discussion.

Abstract discussion

- When a deadline for abstract submissions to a major conference in your field is coming up, it might be useful to have a meeting to discuss and give feedback on students' abstracts.
- Ask people to send the abstracts in advance so everyone can read them before the meeting.
 - You can upload all the abstracts to a box folder and distribute it to the attendees. Be mindful that people might not be willing to share their work with anyone (e.g. people outside your department that might be in the listserv), so it might be convenient to ask in advance who will participate in that meeting and only distribute the abstracts among the attendees.
- To moderate the meeting, think how much time you'll have to discuss each abstract. For instance, if you have 4 abstracts to discuss during a one-hour meeting, you have 15 minutes for each abstract.
 - Make sure to communicate time allotments clearly so nobody ends up with no comments on their abstract.
 - Check the time as the meeting goes and remind participants when it's time to move on to the next abstract.

Job talks/conference prep

Workshop meetings are also a great opportunity to practice at conferences or job talks. Communicate the format of the meeting before it starts so attendees know what to focus on when providing feedback.

Mini conferences

Many workshops choose to host a mini conference each year so that more students have a chance to present their work within a more condensed and focused time period. Mini conferences are also a great opportunity for students to get to know graduate students and faculty from other (often nearby) universities.

- Workshops must contact CAS with their proposal for a mini conference at least 3 months before the date. Review will be completed by the Council. If additional information or explanation is needed the CAS office will follow up with the coordinators.

Fieldwork/research recap

At the beginning of the academic year or even at the beginning of each quarter, you can organize a session dedicated to fieldwork/research recap, in which some or all of the attendees give a short lightning talk with a summary of their summer fieldwork/research. This is a good way to get to know everyone's research and to create a sense of community.

Film screenings

- Complement screenings with a discussion session afterwards.

Attendance

There is no ideal or required number of attendees, and each workshop has its own regular attendees. There are, however, ways to be creative and to invite more students and faculty to join.

Faculty

Per CAS requirements, at least one of the faculty workshop sponsors should attend each workshop session.

Ways to increase faculty attendance:

- Ask the speaker if there are particular faculty members they would like to attend and send a personal email to those faculty members asking if they can join for that session.
- Ask the faculty sponsor if they can reach out to other faculty members and request that they try to join more sessions.
- Ask faculty for their input on invited speakers. This encourages attendance of the faculty asked as well.

Students

Ways to increase student attendance:

- Provide drinks, food, or snacks at the workshop.
 - Because of budget constraints, this may not be possible.
- Select student presenters from regular attendees of the workshop. This creates a sense of community and lets attendees know their presence is appreciated.
- Reach out to specific students directly if you know their research interests and suspect a particular presentation could be of interest.
- Request feedback from students on whom to invite to present. This can increase attendance if their preferred speaker presents.
- Finally, certain faculty members may be able to encourage students to attend a workshop if asked.
- Presenters

Whether it's an invited speaker, a faculty member, or a student presenter, it's important to make sure they are prepared for their presentation and any other scheduled meetings:

- Make sure they make it to the presentation venue or their lunch meeting. It is important to provide clear details regarding locations and times.
- Arrange transportation if the location is off campus or beyond walking distance from their

hotel (remember that transportation can be reimbursed).

- If an invited speaker does not have a lunch appointment, make sure they have access to food, whether you direct them to a place for them to eat or provide food yourself (this too can be reimbursed).
- If the speaker has some downtime between meetings, if it is possible, it can be helpful to provide a quiet place for them to work or relax. This might require booking a small room in advance (this can be done by department administrators or Sandra Jackson). It could even be the same room where they are meeting students.
- Have a bottle of water or another beverage prepared for speakers during their presentation.

Food and Beverage

Food and beverages provided by the workshop can include meals or snacks provided for workshop attendees, as well as meals purchased for invited speakers and/or guests.

If your Workshop is planning to serve alcoholic beverages, make sure you comply with the University's guidelines, which can be found here <https://studentmanual.uchicago.edu/university-policies/alcohol-other-drugs/>.