

Lessons learned from MCSA 2022

Developing rules / ways of working

(what we're doing now!)

Timelines

- Call for location sent out 7 months before the expected date of the conference
- Shortlisted locations decided no later than 6 months before the expected date of the conference
- Decision made on location 5 months before the expected date of the conference
- Decision made on venue and date 4 months before the expected date of the conference
- Event design proposal submitted no later than 4 months before the first day of the conference
- Event budget finalized no later than 4 months before the first day of the conference
- Date and venue must be confirmed no later than 3 months before the first day of the event (contracts signed)
- Ticket sales must commence no later than 3 months before the first day of the conference
- Website and call for speakers need to be created and published no later than 3 months before the first day of the conference (Phase 1)
- Schedule must be confirmed and published at least 6 weeks before the first day of the conference (Phase 2)

Location nomination requirements

- Two-phase process of selection
- Phase 1 - simple online form
 - Continent and city
 - Organizers (names / contact details of team)
 - Do you have an idea of a venue
 - Do you have an idea of capacity
- Deciding factors
 - Is there a team to organize
 - Is the team all from one company
 - What is the size of the local community
 - What do we consider local?
 - Ease of reaching the location
 - Within continent

- Internationally
 - Visa / travel restrictions
 - Cost implications
 - Safety and alignment with Code of Conduct
- Phase 2
 - Budget proposal
 - Expected income from ticket sales (intended average price x expected tickets sold)
 - Expected income from sponsorship
 - Mandatory costs to be covered
 - Team travel/accommodation
 - Speaker travel/accommodation
 - International team travel
 - 3 international flights from Europe
 - 3 accommodation of duration of event +2 days
 - Venue / AV
 - Translation (as required)
 - Advertising
 - Catering (may be included in venue hire)
 - Other costs to be expected
 - Examples:
 - Banners
 - Name badges
 - etc
 - Expected surplus for the Mautic community
 - Proposed Date(s)
 - Must take into account holidays / religious events etc. in countries across continent
 - Venue
 - Idea of venue
 - Expected attendee numbers
 - Organization of the event
 - Number of tracks (and therefore rooms in venue)
 - Number of days
 - Training Day: Do you consider adding a training day before the actual conference starts?
 - Training Day in the same venue?
 - Community Day in the same venue?
 - Accommodation at the venue?
 - If not, where else would people stay?
 - Who is going to be on the team
 - Role specification - the following leadership roles needs to have a defined person (can be provisional but must be listed, must be separate people eg no role sharing between these four roles)

- Volunteer coordinator and budget responsibility (overall lead)
 - Program lead
 - Marketing and outreach lead
 - Sponsorship lead
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Information requirements

Website must include (in all agreed languages)

- Code of conduct (Phase 1)
- Venue information (Phase 1)
- Safety information (Phase 2)
- Travel information (Phase 1)
- Accommodation information (Phase 1)
- Ticket purchasing (Phase 1)
- Call for speakers (Phase 1)
- Sponsorship options (Phase 1)
- Contact information (Phase 1)
- Schedule (Phase 2)

Legal requirements

- Contracts with venue
- Contracts with sponsors
- All contracts signed by Project Lead/Open Source Collective

Email management

- Add team to mauticon@ mailing list
- ? have a @mautic.org email account

Finances / financial management

- Covering travel for local and global team and volunteers
- Covering travel for speakers
- Should make a profit
- Breakeven modeling
- Finances must run through the Open Collective
- If a different ticketing system is used the global team must have access

Considerations

- Funding for event volunteers/team members to attend
 - Where possible event volunteers and team members should be funded to attend the event. Leaders generally have their travel and accommodation paid for whereas volunteers generally have their ticket paid for.
 - Any leadership team members who are attending on behalf of the community should seek approval to use community budget before they commit to attending
- Tooling (website, social, email, ticketing etc)
 - The website must be hosted on the official Mautic domain mauticon.mautic.org.
 - Social media channels are provided by the community and content can be scheduled using the tools available (HeyOrca)
 - Emails will be sent through the official Mautic instance
 - Tickets may be sold through open collective or through an external system but the funds must ultimately land in open collective
- Communication
 - The local team are responsible for being in good communication with the marketing and community team
 - Campaigns can be planned in collaboration with the marketing team and central ads accounts can be accessed where appropriate
- Responsibility and accountability
 - The local team should be able to run with the event and not be micromanaged by the community team, but it's important that they remain in good contact with the community team throughout the entire process
 - Reporting on progress should be done on a weekly or fortnightly basis as required
 - It is expected that the core team for the local event attend all meetings where possible or send a deputy if they are unable to attend
- Sourcing sponsors
 - The community team can help with sourcing international / outside the continent sponsors
 - The local team will be responsible for finding and sourcing sponsors from the local market
- Geographic representation
 - Ideally there should be representation across the country/continent with due consideration made to ensure that there is no exclusion of minority groups
- Gender balance for speakers
 - There should always be a gender balance of speakers at the event
 - There should not be panels which are all of the same gender unless it is appropriate for that to be the case specifically due to the topic being discussed
- Managing languages / translations
 - Where english is not the main language spoken in the country the event should be expected to be held in that language.

- If it is feasible to do so translations may be made available into english and/or any other languages that may be appropriate
 - Ultimately the event is for the location in which is being held primarily, not for the international community
- Social events
 - Social events are an important part of any conference or event, but they must be appropriate and should ensure that they are safe and welcoming for all attendees
 - You can have a sponsor cover the cost of social events but they must ensure that the events remain a safe and welcoming space for all
- Information to participants (e.g. safety)
 - Bear in mind that not everybody who attends our event will be familiar with the local area so it's important to make sure that if there's any safety information that they need to be aware of that it's made very clear to them before they attend and during the event
 - It's important to bear in mind that many people remain anxious in spaces with lots of people so we should be sure to communicate what precautions are in place to prevent the spread of any diseases and make this clear on our website.
 - There are ways to help people understand how comfortable others are with being approached - for example having different colored lanyards / badges which indicate whether they are happy to be in physical contact with others.
 - We should also make clear any testing procedures that we expect in order to attend the event and whether masks are to be worn.
 - Ultimately people should feel free to wear masks if they feel safer in doing so and should be made to feel comfortable taking this decision.
- Program / schedule / CfS
 - The program should be agreed in enough time to allow people to book their tickets
 - It's sensible to have one or two sessions in reserve that a speaker is willing to deliver in case of last minute cancellation
 - It's a good idea to be in contact with every speaker in the days running up to the event to ensure that they are aware of their expectations and that they are planning to attend!
 - If there are difficulties in getting to the venue for example with travel it might be worth making sure that you have a slightly later starting time to ensure that people arrive in good time
- Sponsor promotion
 - Make sure that what you promise your sponsors you deliver
 - Rollup banners and similar are better to be made in country rather than in Europe or the US and taken to the event
 - Ensure that companies sending swag are aware of the implications for import duty and tax
 - Create a slide or video that showcases all the sponsor slides that you can show at regular intervals during the event
- Conference theme (design)

- There must not be any corporate branding outside of what is provided to sponsors as part of their package (e.g. sending official emails from a company hosted account/with signatures)

Venue selection

- Ensure that the venue is fully accessible - if possible take a wheelchair yourself or go with someone who is a wheelchair user and test all of the routes that you might need to use to go to and from everything that you might do during the event

Community day

- Including in the price of the ticket (covered by a sponsor)
- Part of the conference, not an optional event

Audio visual on the day / after the event

- Video rendering needs to be factored in

Data protection

- Must use community-owned resources for communication
- Must have the team sign an NDA
- Data must not be used for any purpose other than organising/communicating about the event
- Attendees data is never given to sponsors, but they are able to capture it on the event if they wish to bring a scanner or similar device

Things to consider later

Finding locations

Application process

- Two steps
 - Easy application
 - Short list includes languages covered