

This is an update to [https://wiki.osgeo.org/wiki/FOSS4G\\_Travel\\_Grant\\_Programme\\_Cookbook](https://wiki.osgeo.org/wiki/FOSS4G_Travel_Grant_Programme_Cookbook)

- 20190208 - updated wiki with new content (JB)
- 20190210 - updated wiki with Cameron's suggestions (JB)

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# FOSS4G Travel Grant Program Cookbook

## Setting up a FOSS4G TGP

This guidance is for those considering establishing a FOSS4G Travel Grant Program (TGP) for a regional event or becoming a member of a selection group for a FOSS4G TGP (global or regional). It is based on the experience and lessons learnt in running the 2017 & 2018 TGPs and the regional TGP in Oceania. Each FOSS4G TGP will develop its own approach and hopefully add to this advice.

## Applications to the Conference Committee for OSGeo support

The OSGeo Foundation's Conference Committee (CC) administers the FOSS4G Travel Grant Program on behalf of OSGeo. At the beginning of each calendar year the OSGeo board sets a budget for the TGP, the CC will aim to issue a call for applications for TGP support in early February and potentially will have a second call for applications in July (dependent on whether there is any unallocated budget).

The global FOSS4G and regional LOCs should apply for TGP support by entering the details of their request in a wiki page that will be detailed when the call for applications is announced on the CC mailing list. It is anticipated that 50-60% of the TGP budget will be allocated to the global FOSS4G conference and that the balance will be available to support regional events. The CC may vary these percentages at their discretion.

## Application Criteria

The LOC should:

1. State the amount of TGP support requested in US dollars and confirm that the LOC will provide (at least) matching cash funding. The LOC should explain the source of their funding (e.g. a levy on ticket sales, a level on sponsor income, a specific sponsor, crowdfunding).
2. Confirm that free full conference passes will be available to recipients of Travel Grants in addition to the cash funding provided by the LOC and OSGeo.
3. Estimate the anticipated number of grants and their size.
4. Set out the broad criteria that they will use to select applicants and indicate their priority groups (e.g. gender based, local/regional, specific deprived groups, some other criteria).
5. Confirm that it has a team of volunteers available to administer the selection process and confirm whether it is seeking assistance from CC members in the selection process.
6. Provide details of any accommodation available to TGP recipients e.g. a recommended hostel. Note that any recommended accommodation should be vetted as safe and secure for all event attendees.

7. Outline the manner in which Travel Grants will be paid to recipients and by whom (e.g. cash, PayPal, bank transfer, etc).

## Donations

OSGeo has a PayPal account which can be used to collect donations from individuals (and companies) - the "donate" link is on [this page](#).

You should let the OSGeo Treasurer know if you are planning to direct donors to this link so that they can identify the donations and transfer them to your TGP.

## Confirmation of TGP Funding

The CC will confirm TGP funding to the LOC and clarify any additional conditions or terms as needed.

## Running a TGP

### Getting Started

You need to appoint a chair of selectors who will 'run' the process and keep things on track.

Set clear eligibility guidelines - this will help would-be applicants determine whether they can/should apply, and will save you time in the selections stage. As an example: *You must be a resident of <your geographic region> to be eligible for this grant. (This is only an example, you can set your own eligibility guidelines)*

You'll need to consider carefully whether you provide grants in advance, or only on arrival at the conference. By withholding funds until the grantee arrives at the conference, you probably reduce the risk of no-shows, but some people might find it difficult to come up with the funds up front. One way to manage this is to err on the side of offering to pay grants on arrival, but inviting grantees to get in direct contact if this is difficult for them.

### Timing

Work out a timeline - you should set specific dates for key milestones, for example:

- Launch call for applications
  - The LOC can/should publish the call for applications on <https://www.osgeo.org/initiatives/foss4g-travel-grant-program/>
- Application deadline: 14-28 days after launching call for applications (recommend a minimum of 2 weeks and ideally 3-4 weeks)
- Selection date: 14-28 days after closing call for applications (you will need at least 2 weeks to evaluate applications, possibly 3 or 4 for a global TGP with a lot of entries)

You may wish to set a period to ask questions or seek clarifications from some applicants.

In some regions, it may be important to leave enough time before the event for grantees to secure visas for travel.

If possible, run the TGP early enough that successful applicants have time to submit presentations and workshops.

Bear in mind, the total amount of TGP money (donations, grants from OSGeo etc.) should be known when announcing the number of possible grants. If you publish early and subsequently identify additional funding, there is the possibility to announce more grants later in the process.

## Call for applications

The TGP team will need to draft an application form that includes questions that help to evaluate the applications against the LOC criteria. This is [a copy of a Google form](#) which was used in 2017, it fed into a spreadsheet. There is no need to use this form if you have an alternative tool that you prefer.

This is your first chance to communicate with grant applicants - it's a good opportunity to provide important information so they know what to expect, and so they can write an application that clearly addresses the criteria. This can save you a lot of time later. Clearly articulate the objectives of the program, who it's trying to help, the selection criteria that will be applied, important dates (including deadline!), eligibility guidelines, and your selection criteria.

You'll need to consider how you promote your program, to make sure you reach your audience. Use your committee's professional networks, make contacts with not-for-profits, agencies, and universities to spread the word. You can advertise your program on the OSGeo website here: <https://www.osgeo.org/initiatives/foss4g-travel-grant-program>

You can also set up a Travel Grant page on the OSGeo website a bit like <https://www.osgeo.org/foundation-news/foss4g-2018-travel-grant-programme/> (this might be a duplicate or a link to a page on your event website)

## Selection

- At the close of the application period the chair of selectors should collate all of the applications, anonymise them (so that selection is a "blind" process) and send to each selector.
- Each selector should devise their own personal marking scheme (i.e. you balance the different criteria in the way that you wish, giving more or less weight to income, gender, contribution, applicant has "skin in the game", applicant is likely to apply their learning to

help others or advance OSGeo goals, etc). Each selector should try to be consistent in the way that they evaluate each submission.

- Finally selectors will need to rank the submissions in descending order (based upon your marking). You will only be asked to rank slightly more than the likely number of grants that you will be making i.e. if you expect to cover about 6 grants then each selector might be asked to rank your top 8 in descending order (8 for your top choice, then 7 etc).
- Be ready to handle large numbers of applications:
  - FOSS4G 2017 had 86 applications, it took over 4 hours to review, mark and rank them
  - FOSS4G 2018 had 156 applications
  - the regional FOSS4G SotM Oceania 2018 had 45 applications
- Once the individual selections are completed, the chair will combine the rankings from each of the selectors to provide an overall ranking.
- You may then need to schedule a call to discuss any marginal choices.
- Once you have finalised your selections, you should:
  - contact the applicants who have been successful
  - notify the next few who just missed the cut that they are on a “standby” list
  - contact those who have not been successful
- There is then a wait while people confirm their acceptance of the grant, provide evidence of eligibility criteria, travel plans, visas, etc.

## Run up to the event

There will be quite a lot of correspondence with grant recipients in the run up to the event. In many cases, grantees will be stepping outside their comfort zone, and we encourage you to stay in close contact and provide support while they make their travel plans. If practical, nominate a person to be the key point of contact with TGP grantees. Having a personal contact, rather than a generic [tgp@your-event.org](mailto:tgp@your-event.org) email, will build a sense of mutual trust and make it easier for grantees to get in touch if there are difficulties with travel plans, visas, etc.

We recommend that you get confirmation that the grant recipients will be able to receive funds electronically as you really really really do not want to be trying to issue grants in cash at the conference. However, in many cases, TGP attendees will come from countries with different currencies and banking systems from that of the LOC. This may make direct electronic transfers difficult and you may have to resort to cash. Try to be as adaptable as possible to the needs of the grantees.

## At the event

Look for opportunities to be inclusive of TGP attendees, and make them feel welcome and involved, for example:

- A breakfast for TGP grantees to meet each other, with event organisers in attendance to welcome them.
- Birds of a Feather sessions.

- Try and organise a group photo.
- Ask the grantees to write a short blog post (2-300 words) with a couple of pics that you can publish after the event. It helps to explain the benefits of the TGP to the wider community and helps with fundraising for future events. This could be a requirement on the application form.
- If practical, nominate a person to welcome TGP attendees to the event and be the key on-site point of contact if they need any help.