Memorandum of Understanding Between ADHO and the Local Organizer of a DH Conference

Last revision approved by the ADHO Steering Committee on March 14 2016

This Memorandum of Understanding is between The Alliance of Digital Humanities Organizations (ADHO) and the Local Organizer[1] (LO) of the annual ADHO conference (Digital Humanities [year]). This document outlines the duties and expectations of running a DH conference. The Alliance of Digital Humanities Organizations includes, as constituent organizations, the European Association for Digital Humanities (EADH), the Association for Computers and the Humanities (ACH), the Canadian Society for Digital Humanities / Société Canadienne des humanités numériques (CSDH/SCHN), centerNet, the Australasian Association for Digital Humanities (aaDH), and the Japanese Association for Digital Humanities (JADH).

The Local Organizer should also be aware of the procedures outlined in the Conference Protocol and Conference Annex, as well as in the ADHO Conference Code of Conduct. Further information on planning and hosting a DH conference can be found in the Guidelines for Local Organizers. All four documents are available from the ADHO web site, or on request from the chair of the ADHO Conference Coordinating Committee (CCC).

Basic organizational requirements:

1. Conference date and venue: Details must be firm at least a year prior to the conference. Venue and date should be advertised via inserts or handouts at the DH conference immediately preceding.

2. Conference progress reports: The Local Organizer is required to present prospective, current, and retrospective reports on the conference. The prospective report should be delivered to the ADHO Steering Committee (SC) and to the Executive Committees of ADHO constituent organizations at the conference the year before. This report should include a current budget and draft timetable. In the year of the conference, the Local Organizer should present a report on conference attendance, local arrangements, and ideas for future conferences, to the ADHO SC and the Executive Committees of ADHO constituent organizations. Within six months after the conference, a minimal report, with a minimal budget, should be submitted to the Chair of the Conference Coordinating Committee. This report may be shared with future prospective conference hosts, to assist them in planning a bid.

[1] If relevant, the term is put at the plural in the memorandum.

3. Accommodation: Student housing and hotel accommodations must be made available by the LO no later than 6 months before the conference begins.

4. Food: It is expected that morning and afternoon tea/coffee will be included as part of the registration fee. The LO must also arrange a conference banquet, which should be optional and priced for cost-recovery. It is a requirement that alternative dietary requirements and vegetarian options be readily available for all catered aspects of the conference (morning/afternoon teas, special events, and the conference banquet). The registration process will allow delegates to specify their dietary requirements.

5. The LO may organize one or more excursions for conference participants. Participants register and pay separately for these, and pricing should be based on cost recovery.

6. Disabled access: During the conference disabled access to all venues and events is required. If excursions cannot be made accessible to the disabled, this should be clearly noted in the registration materials.

7. Childcare: During the conference optional childcare provisions for delegates should be made available at the delegate's own cost and responsibility.

8. Media liaison: The Local Organizer should designate a media liaison to encourage and facilitate media exposure for the conference.

9. Registration receipts: Acknowledgement of registration must be made by a printed or printable letter with full details of the registration paid and accompanied by a full tax invoice for all payments made.

Finances:

1. Budget and financial records: A complete set of financial records should be kept, including costs of venue hire and all associated conference expenses. Receipts must be kept for all expenses. Tax invoices/receipts supplied to delegates should be in conformance with local legislative requirements for tax invoices/receipts. A conference budget must be developed as part of the original conference proposal (preliminary conference budget will be supplied). The budget should include scenarios for income and expenditure based on varying numbers of paying delegates. A minimal budget and conference report should be sent to the chair of the CCC by the end of the calendar year in which the conference occurs.

2. Conference financing: ADHO will financially underwrite the annual conference. Conference expenses and registration fees should be planned to break even with a minimum number of registrants (approximately 250), with surpluses and deficits for additional registrants being distributed at a ratio to ADHO and to the local organizer according to this formula:

75% ADHO / 25% LO

At least 20% of ADHO's share will be earmarked specifically for conference travel bursaries. These bursaries may be available for the conference at hand if there are enough early registrations to project the surplus. Some funds may be available in advance to pay for reservation fees, publicity, and so forth; the LO should seek approval from the CCC before requesting any advance funds from ADHO.

A line-item budget proposed by the LO must be initially approved by ADHO (SC), and any deviation from the budget that, in sum, totals an increase greater than 10% of the approved total should only happen with ADHO's approval (SC). While the venue from year to year may require quite different financial obligations (because of regional economics, involvement of local universities, and so forth), certain standards should be followed to keep infrastructure, venue, food, and swag costs within reason, with the goal of lowering registration fees in line with the principles in the previous paragraph. The LO, the CCC, and the ADHO treasurer should begin budgetary conversations 18 months before the planned conference dates.

ADHO will provide (as a conference expense) event insurance (and loss protection) and will provide a monthly allowance (1000 euro/month) for a "conference officer." Ideally, this conference officer will be coordinated from the ADHO side and persist from conference to conference, to provide continuity among different LOs, venues, etc. The conference officer will generally focus on ADHO's interest in the conference and will work closely with the LO's budget, but he or she may be available for certain tasks (research, budgetary analysis, help with conference management software, etc.) for conferences more than one year away.

3. Sponsorship: ADHO recommends that sponsors who provide significant funds towards a conference be offered Gold, Silver or Bronze categories for conference support depending upon the amount of funds offered; sponsorship for bursaries (€750 each) may be included as part of one of these categories. Alternative arrangements can be considered, but they should be submitted by the LO(s) to the CCC Chair and/or whoever is overseeing sponsorship for ADHO (still under consideration) for approval. It is important to be clear about the role of sponsors,

and to remain aware of the value an ADHO conference presents. As detailed in the Annex, conference proposals should include a 'Sponsorship Strategy' section for consideration by CCC and, if appropriate, SC. Sponsors should not be offered time in the academic program and it should be made absolutely clear in all conference material that their input is commercial in nature. Any deviation from this principle must involve strong consultation with the PC and CCC, with adequate time for discussion.

4. Registration fees: Registration fees are set by the LO, but should be kept as low as cost recovery will allow. There are to be separate registration rates for: Members, Non-members, Student members, Student non-members, Members discounted, Non-members discounted, and a day-only rate. The Non-member fee should be greater than the Member fee by at least the cost of an individual DSH subscription.

Participation at pre-conference workshops and tutorials requires payment of the entire conference registration fee and eventually an additional fee if the workshop organizer requires this. There are no "workshop-only" rates.

5. ADHO members: A list of the ADHO (EADH, ACH, CSDH/SCHN, aaDH, centerNet, JADH) members can be obtained from the ADHO liaison to Oxford University Press, or by request to the Chair of the CCC. This list is for the express purpose of verifying membership status of those registrants who indicate that they are members. This list is not to be used for any other purpose and must not be distributed to any third party. In the same way, the list of the participants who attended to a DH conference should not be distributed to any third party after the conference.

6. Reciprocal conference arrangements: ADHO does not at present have reciprocal registration arrangement with any other associations or societies.

7. Liability: Any and all liability for conference events and participants beyond the scope of ADHO-provided event insurance is the responsibility of the local organizer.

Conference format:

1. Conference length: The conference proper runs for three and a half days. On the two and a half days before the conference there will be meetings of the ADHO SC and of the Executive Committees of ACH, EADH and centerNet. Workshops and

tutorials are usually organized a day and half before the conference, and the Program Committee (PC) approves proposals for these.

2. Program Committee: The Program Committee is separately appointed by the ADHO SC. The LO is a non-voting member of the PC and should participate in all discussions relating to the academic programme and its requirements. LO and PC Chair should confer at least once a week during the period from the due date for submissions to the date of the conference.

3. Conftool: ADHO provides an online conference facility for delegate registration and the submission of papers and abstracts, called Conftool. The Program Committee will use this facility for the submission and refereeing of abstracts, and the LO can use it for registration and space-planning. The LO will have administrative rights within Conftool, for the calendar year in which the conference occurs. It is the responsibility of the CCC to ensure that the Conftool software is up to date and properly licensed, that relevant information has been migrated forward from previous years, and that Conftool has been configured to reflect the identity of the LO. It is the responsibility of the LO to ensure that content pertaining to registration and meeting space is accurate and up-to-date. ADHO has developed software for converting abstracts into TEI, the Convalidator, and the LO, whose responsibility it is to produce the abstracts in TEI format, should normally plan to use Convalidator.

4. Bursaries: ADHO administers bursaries for student and young-scholar members who have submitted an application and had their paper accepted for the conference. The bursaries are paid by ADHO and are intended to help defray expenses incurred in attending the conference, such as the conference fee, airline/train fare, lodging, and meals. These costs will be paid by the recipient: ADHO does not require itemized accounting of costs, but recipients should keep documentation of their expenses nevertheless if the money might otherwise be subject to taxes. At least 14 such bursaries are awarded each year, selected by the ADHO Awards Committee.

5. Draft conference timetable and key events: The ADHO SC will supply a draft timetable with required key events. The following are usual features of a ADHO conference:

- Day –2: ADHO Steering Committee meeting

- Day –1: Committee meetings of constituent organizations / Workshops or tutorials

- Day 0: First day of conference proper
  Morning: ADHO Steering Committee re-convenes /Workshops or tutorials
  Afternoon: Arrival and registration for participants/ Workshops or tutorials
  Late afternoon: Opening plenary
  Early evening: Reception

- Day 1: Conference sessions

- Day 2: Conference sessions

- Day 3: Conference sessions, including closing session

- Day 4 : Excursions

Additional elements of the schedule are described in the Guidelines for Local Organizers, and include a banquet, Annual General Meetings of constituent organizations, and other events.

6. Keynote speakers: The PC Chair should invite nominations for keynotes from both the PC and the LO. The LO can veto any nomination based on cost: barring a veto, the final choice rests with the PC. If no agreement is possible, the matter should be referred to the CCC Chair. The Busa Award winner, selected by ADHO Awards Committee, will also present a keynote (every third year); Busa Award winner expenses will be covered by ADHO. The Zampolli Award winner, selected by ADHO Awards Committee, will also present a keynote (every third year); Zampolli Award winner expenses will be covered by ADHO. Keynotes should be chosen with consideration of cultural, geographic, disciplinary, and gender inclusivity; the conference theme may also inform choice of keynote speakers.

7. Innovations: Additions to the conference format are encouraged (such as changes to the presentation format), but must be approved by the PC. Once agreement is reached, format changes need to be advertised via the call for papers.

Conference information and publications:

1. Conference brochure: A conference brochure or handout must be supplied to the LO of the conference in the year preceding, in time to be included in registration materials.

2. ADHO presence: ADHO should be identified as prominently as well as the LO's institution on the conference web site, at the registration desk, and on the podium where opening and closing ceremonies are held and wherever plenary sessions are held. This may involve having ADHO banners made.

3. Conference web site: ADHO maintains a web presence at www.adho.org. Local organizers are encouraged to develop a website using a subdomain of this site (dhXXXX.adho.org); ADHO will provide the hosting and long-term archiving in order to ensure security (including a CMS solution or so, supervised by the ISC). A provisional conference web site should be online at least a year in advance, in time for the conference in the year preceding.

4. Conference e-book of abstracts: At the start of the conference the LO will provide an online book of abstracts of the papers accepted for presentation. At the end of the conference, the LO will provide full access to the complete material of the ebook and abstracts to ADHO. The LO should consult with the PC for the final version of abstracts and figures, and the LO has discretion in deciding whether to include authors who have incomplete materials. It is highly desirable to have the abstracts marked up in TEI, so that they can easily be added to the archive of past years' abstracts. The use of the ConValidator (maintained by ISC and described in the ConValidator report available on request from either the ISC or CCC) is highly recommended. LO should liaise with ISC about this tool, and ensure they are up to date with its current state, as described in the ConValidator report. Issues with the tool that cannot be resolved between the LO and ISC should be raised with the CCC in the first instance.

5. Publication of Selected Conference Papers: A selection of conference papers will be published in ADHO journals (DSH and any other journals sponsored by ADHO). LO and PC Chair normally act as co-editors for the DSH publication, and may act as co-editors for others publications in journals sponsored by ADHO as well. If the LO and PC Chair, for any significant reason, are unable to assume the editorial task, they have to provide the names of two scholars that will replace them, in agreement with the CCC, the PC and the SC, and with the editor. The Communication Committee will provide on the ADHO website links to the other papers published from a DH conference.

6. Refereeing of Submitted Papers: Refereeing papers is the responsibility of the Program Committee, not the Local Organizer, however, the LO is welcome to act as a reviewer.

Conference evaluation:

1. Conference evaluation: The LO is encouraged to arrange a brief conference evaluation survey of participants, and to include results of that survey in his or her report to the CCC.

2. Post-conference report: The LO is required to submit a minimal report to the ADHO CCC by the end of the calendar year in which the conference occurs. The report must include a brief overview of key conference features, the minimal financial statements (including registration numbers by category), and recommendations for the future.

Agreed to by the following parties:

Head of Department/School hosting conference:

_____

Local Organizer: _____

ADHO Chair: _____

Date:

ADHO Conference Memorandum of Understanding:

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