

Un-Meeting

Event Guide



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Introduction: What's an Un-Meeting?

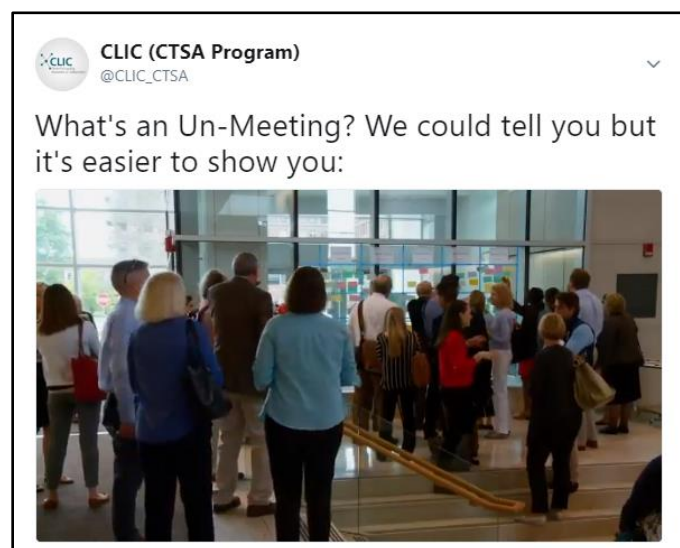
Concept

An Un-Meeting is an event without the rules and structure of a traditional conference. Attendees create and drive the agenda and discussions, based on a common theme. This format provides a unique approach for attendees to discuss their experiences and identify areas of potential research, innovation and collaboration. The Un-Meeting is an interactive way to cultivate ideas that the CTSA Program can use to make productive connections across academic centers and between academia, industry, government, and the community with the goal of developing multidisciplinary and collaborative partnerships.

The Center for Leading Innovation and Collaboration (CLIC) hosts consortium-wide Un-Meetings at the University of Rochester, bringing together over 100 researchers, clinicians, and public health professionals to discuss how to best address current health issues through the lens of translational science. Attendees from more than 40 institutions, agencies and companies from across the country gather to discuss emergent topics, forge new partnerships and collaborations, and develop action steps for future work.

These recap videos show highlights from the [2018 Un-Meeting to Address the Opioid Crisis](#) and [2019 Machine Learning and Artificial Intelligence Applications in Translational Science Un-Meeting](#). Additional information and resources from the events can be found here – [2018](#), [2019](#).

Additionally, this [brief video](#) from the University of Montana provides an overview of the Un-Meeting concept.



Why Should My Hub Host an Un-Meeting?

Team science is a critical element of the success of the CTSA Program. Un-Meetings are one way to foster team science and collaboration across the consortium. Crucial conversations often take place in informal areas during a conference, such as over coffee. The Un-Meeting format provides the space for these conversations to come to the forefront and guide the event instead of occurring in the background.

CTSA Program hubs are uniquely positioned to convene multidisciplinary stakeholders around crucial clinical and translational science issues. Hosting an Un-Meeting allows CTSA Program hubs, or connected affiliates in collaboration with hubs, to help address barriers and challenges in the field of translational science at both a local and national level.

Goals

- Advance the field of translational science and build collaborations within and external to the CTSA Program consortium through convening a diverse, multidisciplinary stakeholder group
- Provide the structure, framework and support to create a collaborative space for emergent discussion and partnerships
- Impact future research and work with the potential for new collaborative research grant applications, manuscripts and publications, sharing of best practices and innovative program development and implementation

Attendee Perspectives

After the 2018 Opioid Crisis Un-Meeting CLIC asked attendees their perspectives on the format and greatest benefits of attendance.

“I loved the organizational (self-organizing) strategy of the Un-Meeting. The 4x4’s were great. The multidisciplinary characteristics of the event were outstanding. The participants were exciting and interesting to meet. [I] met a number of great new contacts and gained insight for a data mining project.”

“Networking and hearing the different perspectives/viewpoints about the opioid crisis. This is a complex set of issues that require coordinated efforts [to] solve.”

“Great stats, great people!”

“It was enjoyable and engaging.”

“I’m hoping to stay in touch with at least a few of the folks I met.”

“Each of us knows some [aspects] but not the other. Together we can educate each other and add to what we don’t know.”

Getting Started

Theme Identification

The primary goal of CTSA Program Un-Meetings is to advance translational science through the creation of sustainable, collaborative relationships. The meeting theme will reflect the ongoing or emerging work of the consortium at one or more points on the translational science continuum.

Proposed Un-Meeting themes should particularly be focused on key issues in translational science, or directives outlined by the National Center for Translational Sciences (NCATS). Some examples include scientific translational problems on NCATS' "[to-do list](#)," as outlined in Dr. Chris Austin's [presentation](#) at the 2017 Fall CTSA Program Meeting.

Invitation to Attend

Diverse representation at the Un-Meeting is one of the most important aspects of the event. CLIC supported Un-Meetings are open to attendance by all CTSA Program hubs. Un-Meetings foster collaboration and build team science and are meant to draw national representation. Notification, publicity and invitations should reach representatives from academia, government, industry, community and other fields. Conversations will be richer as a result of representation from many sectors and backgrounds.

High-Level Logistics

Date & Time

Considerations should be made regarding time of year related to potential weather or holiday associated travel delays. Un-Meetings are often one day in length, however attendees may choose to travel in advance or stay after the programming.

Travel Reservations and Booking

For CLIC supported Un-Meetings, travel costs and one night of lodging for at least one representative from each CTSA Program hub are eligible for reimbursement by CLIC. To ensure the best prices at the hotel, the Un-Meeting host should reserve a block of hotel rooms as early as possible.

Hub representatives receiving a travel stipend should be reviewed and approved according to a nomination process (*example given in appendix A*).

Any host may want to consider at least partially funding attendees' travel to the event and/or lodging to support participation and diverse geographic representation. Regardless of whether financial support is provided to participants, it is recommended to negotiate a group rate, block rooms at a hotel, and disseminate the code to your attendees.

Venue

It's important to determine a suitable venue well in advance of the event. There may be as many as 125 attendees at your event, or as few as 50, so you'll want to keep this in mind. Additionally, group breakout sessions are formed organically so topic discussion rooms need to comfortably seat varying group sizes.

Consider the following criteria when selecting a venue:

- Easy entrances and exits for participants with diverse needs
- Well-known location in the community
- Visibility
- Sufficient parking
- Access to restrooms
- Suitable space for:
 - 4x4 Presentations (i.e. auditorium)
 - Idea Generation (i.e. open atrium)
 - Approximately 4-5 concurrent Break-Out Sessions (i.e. multiple mid-size rooms)
 - Some sessions will be larger than others so you'll need to ensure flexibility with these rooms
 - Registration/sign-in
 - Food & beverage set-up



As attendees gather, the MC prepares for the next segment



A large, open atrium for food between sessions



Movement between sessions

Key Elements

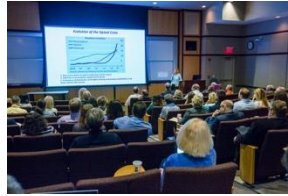
4x4 Presentations

As mentioned, Un-Meetings are generally unstructured in nature and the content of the event is largely driven by participants. To set the stage for engaged networking and discussion, these events typically begin with 4x4 presentations. These extremely brief presentations get their name from their layout: 4 slides in 4 minutes (No-excuses! Typically, a fifth title slide only provides transition between speakers.) A Master of Ceremony (MC) will be key in helping to ensure the presenters stay on track. Plan to have a time keeper sitting in the front row to let presenters know when they are close to and at their four minutes.

A successful Un-Meeting has a good mix of subject matter experts to tackle these 4x4 presentations, and to help frame the issues and identify key topics. Think: local, national, academic, medical, community-driven, political, etc.



Viewing the 4x4 presentations



4x4 presentations kick off the idea generation



4 slides in 4 minutes keeps audience attention

Idea Generation

Following the 4x4 presentations, attendees gather together to identify the subjects and topics they are most interested in discussing. The participants write down the topics of their choice on sticky notes, which are later organized by event coordinators into logical categories – these categories create the topics for each of the break-out sessions. (Note: It may be helpful to have site staff go first to place ideas on the large board in order to encourage participation).



Blank board ready for sticky notes



Attendees are instructed to attach sticky notes, regardless of placement



Idea generation prior to topic sorting

Break-Out Sessions

After approximately 20 minutes of idea generation the sorting process begins. Led by the MC and Steering Committee members the post-it notes are sorted to ensure all the generated ideas are grouped into various overall topic areas. These are labeled with the new, emergent topic title. Room assignments are also scribed onto the topics. At this point, participants are encouraged to move whatever session they are most interested in, whether they're experts on the matter, or simply eager to hear new perspectives.



Topic of room discussion



Attendees gather for discussion



Topic of room discussion

First “Un-Rule”: The Law of Mobility/The Law of Two Feet

It’s important to communicate to participants that, by design, Un-Meetings are very fluid and flexible in nature. If an attendee chooses a break-out session that they later find themselves uninterested in, they should feel empowered to leave the session and check out a different one. Attendees are free to go where their interests lie, and leave if their interest wanes.



Other “Un-Rules”

Your team can choose the right “un-rules” for your event and team philosophy. The spirit of these is creation of a welcoming space where people are free to share, be heard and drive their own learning.

Examples:

- No one knows everything...just ask
- Whatever happens...happens
- There are NO wrong questions...or answers
- Whoever comes are the right people
- Whatever happens is the only thing that could have
- Whenever it starts is the right time
- When it’s over, it’s over

Additional examples are available in appendix B.

Identifying Your Team

Building your Un-Meeting team is similar to building a team for other events; a strong team and group of partners will ensure a successful event. The planning team is the foundation of the event. While the event itself is “unstructured,” the development and production of the event has a structure pre-defined by the team.

Core Planning Team (Event Organizers)

A well-managed event requires careful planning. It is therefore critical to appoint a lead or co-leads for your event. The Core Team will be responsible for organizing, managing and directing the event process. The lead/co-leads may find it helpful to maintain detailed records of each step along the way.

To assist your project planning, an example event timeline/back-out schedule is available as appendix D.

To keep everyone organized and accountable, it may be beneficial to create a roles and responsibilities chart which documents each key team member along with their corresponding responsibilities. Alternatively, you may choose to use project management software to assign, monitor and track tasks and each team member’s progress.

Sample Core Team high level roles & responsibilities chart:

Team Member	Roles & Responsibilities
Event Lead	<ul style="list-style-type: none"> • Overall project management • Final approvals for budget • Steering Committee
Event Planner	<ul style="list-style-type: none"> • Maintain and update budget • Hotel block • Venue • Food and beverage • Monitor registration • Audio/visual
Event Coordination Support	<ul style="list-style-type: none"> • Tracking stipend nominees • Processing reimbursement • Registration
Communications Coordinator	<ul style="list-style-type: none"> • Communications plan • Social media posting • Registration promotion

Steering Committee

A Steering Committee is an important part of the Un-Meeting, as these individuals provide overarching guidance and direction for the theme, act as either presenters or nominators of presenters and assist on the day of the Un-Meeting.

Establishing a group of approximately 8-12 individuals as early as with the inception of the topic area will assist the planning and development of the Un-Meeting. It can be helpful to have representatives with diverse expertise from academia, industry, government, patient groups and other organizations. The event organizers and Steering Committee may choose to meet more frequently, however at least two group meetings will help ensure direction and implementation.

Steering Committee members may be selected for a variety of reasons, including:

- Knowledge leaders on the Un-Meeting Theme
- Representatives from across different sectors
- Able to provide or identify subject matter experts for the 4x4 sessions.

- Assist identification of potential ideas for synergistic activities to promote future collaboration
- Advise on approaches to engage multi-disciplinary participants

The Steering Committee can play an integral part in ensuring the theme is broad enough to elicit engaging conversation and lead to actionable collaboration. Typically, a broader theme is preferable as the attendees may come from various backgrounds related to the theme.

Master(s) of Ceremonies (MC)

The “Master of Ceremonies” is a critical role to lead, guide and engage attendees, as s/he serves as the driver of the “un-agenda” throughout the day. One or more individuals may serve in this role; the abilities to motivate, inspire and direct are key personality traits for the MC.

Responsibilities of the MC(s) include:

- Opening Remarks
 - Setting the “groundwork” for the meeting, including “Un-Rules”
- High level direction
 - Guiding and organizing idea generation and topic sorting (with assistance if needed)
 - Providing ongoing instruction about process and location of breakout sessions
- Closing remarks

Promotion/Communication Coordinator

In order to raise awareness and drive participation, it’s important to execute effective promotions and communications surrounding your Un-Meeting. The promotion and/or communication coordinator is responsible for building and carrying out a communications plan, which should involve some combination of:

- CTSA Program outreach
- Community outreach
- Media relations
- Content marketing
- Social media

The ideal promotion and/or communication coordinator has some prior experience in event communications.

Please reference appendix F for a sample Communications Plan.

Conversation Catalysts

Despite the premise that those in the room are the right people at the time for the discussion, the conversation may need some support. Your team may choose to assign a presenter from

the 4x4 session and/or a staff member to a relevant discussion room, based on topic and level of experience.

A suggestion is to prepare each individual with a series of open-ended questions that can support or help catalyze the conversation if there is a lull in discussion. This is a fine line, since attendees are encouraged to use the “Law of Two Feet” and move to a different conversation (or none at all) as they so choose. It is important that a Conversation Catalyst understands that his/her role is supportive and not directive.

Examples of open-ended questions for preparation:

- What interested you about this topic?
- What are you hoping to learn from this discussion?
- What are some things you can share about this topic?
- What are your thoughts on this topic?
- Why did you choose this discussion topic?
- In what ways is your experience with this topic similar or different from what you’ve heard?

Keep in mind that the conversation may veer away from the topic as written since those involved share their own experiences, observations and knowledge.

Day-of Event Support

Along with the core team of event organizers, additional support staff will be needed to ensure that the event goes smoothly. The day-of event support is a critical element of your team. In order to ensure that the event runs smoothly and seamlessly, you’ll need to put together a team of people who are able to assist with the following tasks throughout the day:

- Set-up and take-down
- Sign-in/registration
- Food and beverage coordination
- Direct traffic, greet participants, answer questions, etc.
- Floaters without direct responsibility to assist as back up for all tasks

CLIC recommends having roughly 5 additional team members help out with day-of support, in addition to the core team of event organizers. However, this number may be adjusted based on the size and scope of your Un-Meeting and Core Team size.

Please inform CLIC (unmeetings@clic-ctsa.org) if you would like an example “running order” which outlines tasks and personnel assignments for the day of the Un-Meeting.

Institutional Support

We also encourage seeking additional partnerships within your institution. Suggestions include:

- Leadership of your CTSA Program hub

- Domain-specific experts (i.e. people who have expertise and experience related to the theme of your Un-Meeting)
- Marketing department
- Communications department

Budget

Budget Considerations

The Un-Meeting host is responsible for all costs incurred as a result of marketing, venue, food, travel stipends, etc. It is recommended that the initial projection include at least the suggested line items and that all costs be tracked, regardless of whether they are eligible to be reimbursed by CLIC (i.e. staff time is in-eligible for reimbursement).

An important consideration is the comfort and ease of the attendees. This may guide decisions about how often to provide food and beverages and what is included. Ensure food choices include options for a variety of dietary needs, as identified in the initial registration.

A sample budget template is available in appendix H

Logistics

Attendee Registration

Registration can be accomplished through an online platform such as Eventbrite, Qualtrics, or REDCap. CLIC can provide assistance with REDCap (Note: CLIC can share .xml files for upload to REDCap if needed). Please note - CLIC-supported Un-Meetings will have use of registration tools on CLIC's website.

Before opening registration, identify the appropriate maximum registration number based on the target attendance goal. Determine the registration close date prior to releasing the registration link and track registration closely along the way. An example registration form can be seen [here](#).

Items to promote and include in registration materials:

- Date, time and duration, including reception details
- Theme
- Location
- Hotel block arrangements
- Transportation
- Attire – typically casual is appropriate. Think - “The casual side of business casual”

Items to request in registration:

- Name and contact (phone, email)
- CTSA Program hub affiliation

- Brief bio – background and related expertise/interest
 - Provide a word count limit or specify 2-3 sentences
- Photograph
- Dietary restrictions
- Inform attendees that during the Un-Meeting there will be photo and video coverage

For CLIC funded Un-Meetings, Hub Travel Stipend Nominees require additional coordination. Please see appendix A for sample forms and procedures.

Agenda Creation

While Un-Meetings are intentionally unstructured by nature, an overarching “Un-Agenda” will help eliminate confusion and drive interest prior to the event. We recommend that you keep this ‘Un-Agenda’ relatively open-ended to allow for flexibility throughout the day.

A sample ‘Un-Agenda’ is available in appendix E.

Equipment & Supplies

- Large wall, window, or board for idea generation
- Pads of sticky notes (many!)
- Large format sticky pad (for designating the session topics)
- Painters tape (method to create the idea board)
- Sharpies/markers
- Portable table near the idea board (for writing on)
- Signage for breakouts
- Pens
- Name tags
 - Paper for printing
 - Name tag holders
- Lanyards
- Table cloths
- Video timer (iPad/Tablet) for 4x4
- Microphone(s) / PA system
- Free standing screens to replay the 4x4s during lunch / break

Printed Materials

Attendee Briefing Book

In order to help attendees feel well-informed at your Un-Meeting, it’s critical to pull together key materials ahead of the event. A ‘Briefing Book’ can feature:

- A welcome message
- Information about the event organizers and planning team

- Logistical details
- Event background
- Reference materials
- Attendee background/bios and pictures

These books can be sent out electronically prior to the event. A sample briefing book can be seen [here](#). You may choose to print copies of the book to distribute to attendees at the Un-Meeting. Additionally or instead, an attendee list including name, email addresses and affiliate institutions can be distributed at the Un-Meeting.

Additionally consider how attendees will receive materials after the Un-Meeting. A summary booklet can include pictures and contact information for all attendees, with the addition of idea generation and topic discussion information gathered at the Un-Meeting. An example can be seen [here](#).

Un-Agenda and Un-Rules

A printed double-sided sheet of the Un-Agenda and Un-Rules can help remind attendees of the overall flow of the day and the goals of the Un-Meeting. This can be handed out at registration.

Funding & Collaboration Opportunities

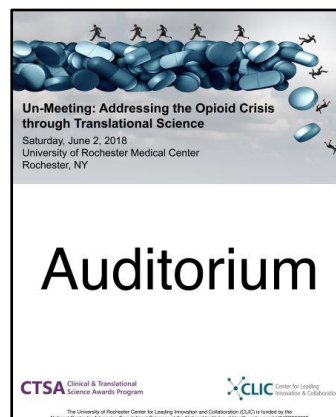
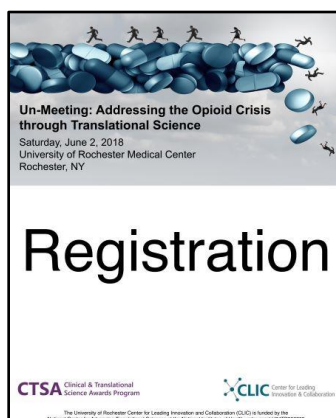
A major goal of Un-Meetings is to encourage further collaboration and action beyond the event. One way to do this is to compile a succinct list of funding and collaboration opportunities that are relevant to your event's theme.

These lists can be sent out electronically prior to the event, and also distributed as hard copies on the day-of. A sample federal funding opportunities list can be seen [here](#).

Signage

Having clear and strategically placed signage on the day of the event will help with promotion and professionalism, and also help with managing and directing participants.

Sample signage:



Food & Drink

It is recommended that the host provides breakfast, lunch and afternoon refreshments for the attendees during the Un-Meeting. This allows attendees to stay in the facility, continue to engage with one another and further catalyze conversations.

We recommend working with your institution's events department if you're not sure where to look for reliable catering companies. You'll want to set up the food stations in a central and easily accessible location within your event. Consider, also, the overall flow of the day. It will be advantageous to be able to set up food while attendees are in breakout sessions and not interfere with conversation flow and foot traffic.

An additional consideration would be to have a pre- and/or post-event reception to foster additional networking. The investment in these type of occasions is up to the host, and dependent on the number of attendees.

Be mindful of dietary restrictions such as gluten allergies and be sure to offer vegetarian and/or vegan options if needed. It is often a good idea to collect this information within the registration form.

A sanitary, clean environment during the Un-Meeting will help attendees feel engaged and welcomed. Ensure methods for quick and easy garbage pickup and make sure there are staff or vendors on hand to handle spills and messes.

Sample food & drink outline:

Before the Un-Meeting

- Host a pre-event reception or schedule a meet-up location
 - Light hors d'oeuvres
 - Cash bar

During the Un-Meeting

- Coffee replenished throughout the day
- Breakfast
- Lunch
- Snacks

After the Un-Meeting

- Post-event reception or schedule a meet-up location
 - Local social setting

Photography & Videography

You may want to consider the use of professional, or non-professional, photography and videography to document the success of your event. These materials are extremely helpful to

share on social media, to pass along to local media outlets and to repurpose for future Un-Meeting promotions.

Consider reaching out to your institution's marketing and/or communications department for a list of in-house or recommended local videographers and photographers.

A general statement that photography and videography will take place during the event can be added to the registration information so that attendees are made aware and can choose to opt out if needed. Be sure to collect appropriate permissions from presenters if you do plan to pursue photo and video on-site in order to post presentations after the Un-Meeting. Consider outreach to your institutions public relations, marketing or event-planning teams for specific guidance about your institution's requirements.

Set-up & Take-down

Set up

When working with the venue, you'll want to quickly establish the time at which the Un-Meeting team can arrive on the day of the event. You may also want to set up in advance if possible. Rooms should be clean, including floors and tables. Contact your institution or venue-specific departments early in the planning process to determine whether facility staff will be responsible for cleaning, and to what extent.

Room set-up should be conducive to group conversations where everyone can see one another; horse-shoe or circular configurations are best. 4x4 presentations should be loaded and ready to go.

Food and beverage set-up will either be the responsibility of the team, venue or caterers, as established in the contract. Allow adequate time for setting up breakfast and lunch and switching out coffee carafes or other items throughout the day.

Consider the flow of attendees through the space and provide signage as needed, including indication of restrooms and water. Ensure there is adequate space for the registration area, as well as sufficient space for luggage to be stored. Keep in mind that attendees generally arrive early so advance preparation is needed.

Take down

At the end of the event the Un-Meeting team should ensure all ideas are documented prior to removing post its and other boards – it may be helpful to have a designated note-taker/photo-taker who is responsible for capturing key insights throughout the day. The team will concurrently be responsible for attendee transportation leaving the event and the break-down of any materials, so be sure there are enough hands on deck. It may be helpful to request facility assistance for things like garbage removal as well. Checklists and task assignments will be helpful tools to provide clarity and speed the process.

The “Secret Sauce”

As with any event there will be challenges and successes unique to each Un-Meeting. A few key “secret sauce” items can help the day go smoothly:

- Strong coordination behind the scenes
- An organized, inspiring MC(s) to drive idea generation and keep momentum
- 5-10 ideas generated in advance to kick off the idea board
- Key opinion leaders to ignite the breakout sessions

Promotion/Communication

Communications Plan

Making a plan (and sticking to it) is the key to success. For this type of event, it’s important to map out your major promotions and communications ahead of time, along with the tentative dates for each element, to ensure you’re reaching your target audiences at the best times.

Engage early with your design team for dynamic visuals. Tailor your message to local, state-wide and national audiences as needed. CLIC can assist with promotion through our channels as well.

A sample communications plan outline is available in appendix F.

Marketing & Branding

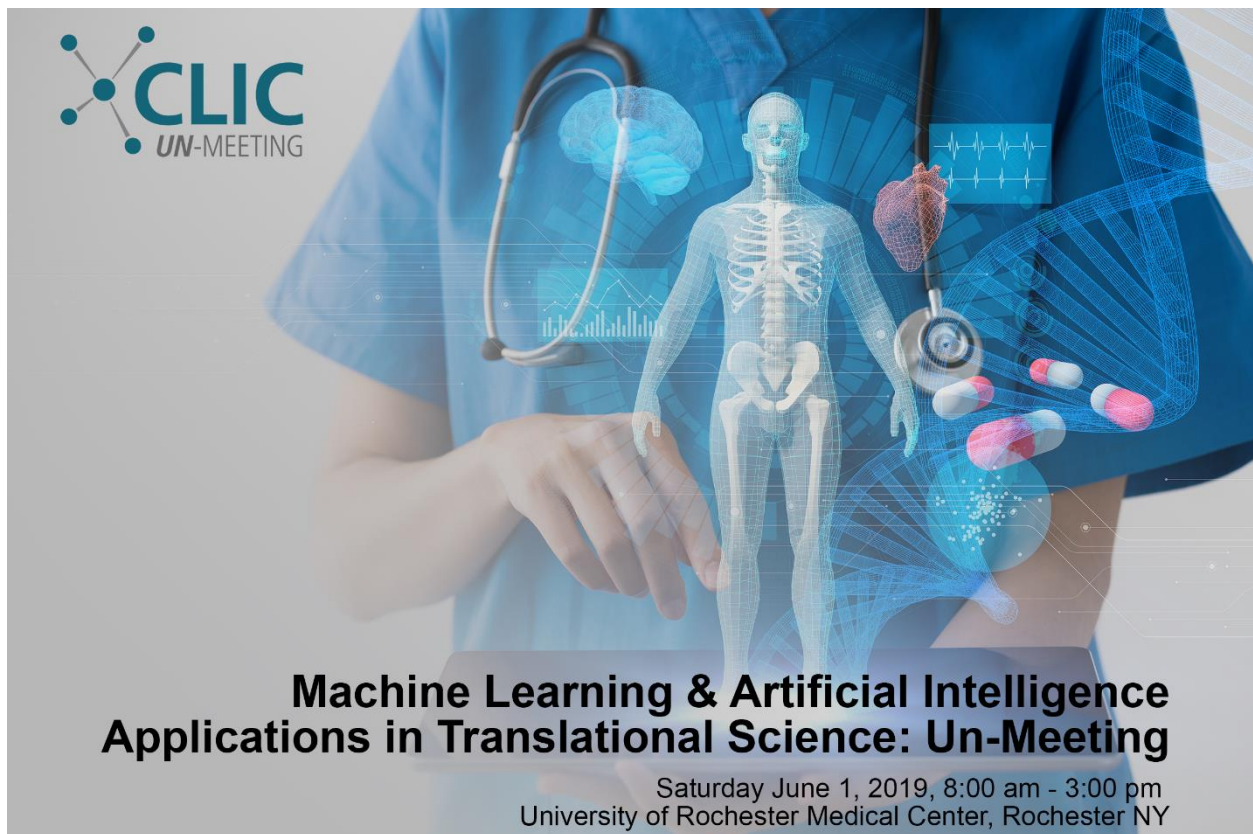
Key Messages

Using language from the event guide (see the introduction section) will help your event stay consistent and aligned with the Un-Meeting brand that CLIC has worked to create. As always, CLIC is happy to help produce/review messaging as you work through your communications.

Promotional materials

Creating branded promotional materials will help you effectively advertise about your event. You can use these pieces for social promotions, website content, printed materials, flyers, etc.

Example material:



Media Relations

Depending on your Un-Meeting topic, date and location, there may be interest from local (or even national) media. Prior to conducting any media outreach, you'll need to decide if you're inviting media to the event, or simply sharing the information in hopes that they will cover the story based on the content you share. If you are planning to invite media to the event, be sure that all attending parties are comfortable with media presence and that you have key spokespeople (likely your event organizers, 4x4 presenters and/or your MC) who are properly media trained and prepared to deliver the right message(s).

As mentioned, another option is to simply share a comprehensive recap of the event with media (background information, video footage, photos, etc.), so that they're able to pull a story together based on your content. Be sure to contact CLIC to let us know about any local stories so we can promote those as well.

A sample media pitch is available in appendix C.

Additional Content

Other communication avenues to consider (along with links to examples from CLIC's Un-Meeting):

- [Website promotions](#)
- [Pre-](#) and [post-event](#) blog posts
- Social media posts
 - https://twitter.com/CLIC_CTSA/status/1002647832187326464
 - https://twitter.com/ncats_nih_gov/status/996057639908933632
 - https://twitter.com/CLIC_CTSA/status/1002896854382727168
- Leverage institutional communications:
 - Institutional newsletters, [social media channels](#), bulletin boards, etc.

Sample social promotion:



Engaging the CTSA Program Consortium

Un-Meetings are intended to be a collaborative opportunity among the CTSA Program consortium. CLIC is happy to help your hub promote your event across the consortium through the following avenues:

- Website
 - Hubs can submit 'Consortium News' stories via the CLIC website
 - You can access this submission form by [logging into the CLIC website](#) and clicking [Submit Consortium News](#)
 - Hubs can submit events to highlight on the CLIC website
 - You can access this submission form by [logging into the CLIC website](#) and clicking [Add Event](#) on the [Events](#) page
- Social media
 - Send CLIC content to promote via [Twitter](#) and share with NCATS for possible social promotion
 - Use a hashtag at the Un-Meeting so that participants can link comments through their own social media accounts
 - #CTSAProgram #UnMeeting #CLIC
- Newsletters
 - There are a few different newsletters which you may be able to leverage to promote your Un-Meeting
 - CTSA Ansible – once monthly newsletter about high-level program updates
 - Send content to CLIC for possible inclusion
 - CLIC News Roundup – bi-monthly newsletter focused on news
 - Send content to CLIC for possible inclusion

Data Capture

Breakout Sessions

Create a plan to capture the rich ideas and information generated from attendees during the event. It is recommended to assign or request a scribe for each breakout room. Scheduling note takers in advance will help with a smooth process. Additionally, if Conversation Catalysts are willing, he/she may be able to take notes during the session. Be sure to capture any next steps or action items decided upon by the group.

- Notes can be taken on large white boards or large format sticky boards. Be sure to keep any notes written on tear-away paper.
- Taking photos of the idea boards can be helpful for quickly capturing all the information for later transcription.
- You may want to ask scribes to bring a laptop and create a shared location for electronic notes.

Action Items

Your team may choose to have attendees reconvene at the close of the day and share key concepts, ideas, or thoughts generated. This gathering can take place in a central location and can be somewhat informal. Be sure to assign a scribe to document these.

Alternatively or additionally, you may consider an “Action” board as attendees leave. You may ask attendees to indicate one thing they will do within the next month to make a next step toward using the learned information and integrating it into their work. They can write these next steps on sticky notes and affix them to the board as they depart.



Dissemination

With numerous ideas generated, the possibility of 20 total breakout sessions and action items your team will have a large quantity of qualitative data at the close of the Un-Meeting. Ensure that you have personnel capacity to transpose the information and document it. An example of the compilation of all the sticky notes, emergent topics, and in room notes can be seen in the [meeting summary](#) document from the Machine Learning and Artificial Intelligence Applications in Translational Science Un-Meeting.

Evaluation

Measuring Success

Feedback from Un-Meeting participants is vital to the success of future events. Regardless of whether you are CLIC-funded or not, if you are hosting an Un-Meeting in the CTSA Program consortium, we encourage you to contact CLIC to work with us on creating and disseminating a survey of attendees.

Potential questions to ask on the follow-up evaluation:

- What was your favorite aspect of the event?

- What did you think about the 'Un-Meeting' format?
- What would you have changed about the event?
- Do you have any open-ended feedback about the event?
- Did you meet anyone that you foresee collaborating with in the future?

Sample evaluation survey:

CLIC's survey from the Opioid Crisis Un-Meeting is available [here](#).

Team Debrief

It's also a good idea to set up a debrief meeting with your organizing team after the event to discuss what went well, what needed improvement and what you would change in the future.

Longitudinal Follow-Up

Consider developing metrics of success for your Un-Meeting, both short and long-term. Longitudinal follow-up after the event at six months, 12 months and beyond can provide the opportunity to learn more about collaborations that may have developed starting with your Un-Meeting – things like new mentoring relationships, research partnerships, publications and funding opportunities are all potential outcomes of the multi-disciplinary collaborations that may emerge from Un-Meeting events. Plan ways to report on these collaborations – perhaps a blog post, an infographic, a news release, etc. Continue to keep CLIC informed as you promote your outcomes and we will amplify this work across the consortium as well.

Wishing you the best for a successful event and long-term collaborations!

Appendix

A: Hub Travel Award Nomination and Processing

For CLIC funded Un-Meetings each CTSA hub is eligible to nominate one individual to receive travel reimbursement. It is not required that the individual be the PI of the hub, however the PI must provide a letter of support.

CLIC funded travel awards must be documented and justification must be available when an invoice is submitted to CLIC. It is expected that the funded hub will reimburse the travel awardees directly and invoice CLIC for all expenditures in one sum. It is recommended that the host location appoint 1-2 individuals to track expenditures and aggregate receipts. CLIC can arrange a meeting with the University of Rochester CTSI Finance Team early in the process to help ensure the correct documentation is obtained and presented with the invoice.

Note: In order to ensure hubs do not duplicate nominations frequent review and maintenance of the nominee list is important. It is recommended that nominees also complete general registration as well.

Stipend Process

1. Create nomination form
 - a. An example of the nomination form used can be seen [here](#).
2. Call for stipend nominations
 - a. Promote nomination form and request letter of support (LOS)
 - b. Email PI's and/or Administrators
3. Track nominees
 - a. An example/blank tracking form can be obtained [here](#)
4. Nomination end date (1 month prior to event date)
5. Nomination acknowledgement letter sent to nominee by email (cc individual who provided LOS)
 - a. Example can be seen [here](#)
 - b. Include a stipend reimbursement form to be completed after Un-Meeting, example [here](#)
 - c. Describe reimbursement process and additional information about hotel room booking, if applicable¹
6. Nominee completes general registration form
7. Hotel reservation made (separate from general registration- if granting hotel costs as well)
8. Specific email communications as necessary to ensure nominees are registered, have secured their transportation and
9. Event
10. Obtain travel receipts / reimbursement information
 - a. Example follow up email request can be seen [here](#)
11. Process reimbursement

¹If hotel costs will be included in the costs eligible for reimbursement, include any special instructions (i.e. submit hotel receipts with travel expenses). If the host hub will pay hotel costs separately as a group then include instructions on how to secure a hotel room.

B: Un-Rules of Engagement

The Law of Mobility

By design, Un-Meetings are very fluid and flexible in nature. Attendees are free to go where interests lie, and leave if interest wanes. Similarly, potential collaborators may want to start working on ideas right away, claiming a place to chat with coffee.

The Law of Curiosity

No one knows everything ... just ask! There are NO wrong questions ... or answers. This goes for acronyms and jargon too. Feel free to “translate in real time” when more explanation about specific terms is needed.

The Law of Efficiency

We want to make every second count. The day is in your hands, and we are open to opportunities for efficiency. Feel free to start jotting down ideas on Sticky early. Or, when your breakout group meets, start talking right away. If no one has started the discussion yet, feel free to jump in.

The Law of Flow

Be open to however the Un-Meeting might unfold. Whatever happens ... happens. Whoever comes are the right people. Whatever happens is the only thing that could have. Whenever it starts is the right time. When it's over, it's over.

The Law of Momentum

The Un-Meeting is as much about what happens after the event, as it is about the event itself. We hope you'll pledge at least one action item as you leave. We want to continue the conversation. Together, we can turn possibility into reality.

The Law of Making Space

Strive to let all voices be heard. Each individual has valuable knowledge, experience and contributions to bring to the table. Be cognizant of your own style of communicating and flex if possible. Do you usually speak up first? Try waiting an extra moment. Do you usually spend most of the time listening? Try speaking up earlier. As a group we want to have the utmost respect, consideration, and time for all viewpoints.

C: Sample Media Pitch

Dear XXX,

Today, researchers, doctors and public health professionals from around the country will be in Rochester to discuss how science can help combat the opioid epidemic. Attendees from over 40 institutions, agencies and companies – including experts from as close as the Canandaigua VA Medical Center and as far as UCLA – will focus on topics like developing non-addictive strategies to manage pain and creating new ways to encourage those with opioid use disorders to participate in research.

The [event](#), hosted by the [Center for Leading Innovation and Collaboration](#) (CLIC) at the University of Rochester, is an example of the Rochester community's commitment to helping resolve this public health crisis at both a local and national level.

We have a videographer and photographer on-site and are happy to share b-roll and photo highlights with you around 2 p.m. today. I've included some additional information below and can plan to send further details when I share the multimedia package.

Please let me know if you have any questions!

Thanks!

XXX

D: Sample Event Planning Timeline

Since each host will have a unique approach and process, this example is not meant to be all inclusive or completely representative of the items and timeline leading up to the Un-Meeting.

Example 1

Item	Description	Timeline
Core team	Finalize Meet Meet on established frequency Determine additional staff as needed and onboard	5-6 months prior 5-6 months prior 1-2x/month 2 months prior
Steering Committee	Core team identifies SC members Letter to invite SC members First meeting, establish philosophy & milestones Second meeting, milestone check in Additional meetings as needed	4.5 months prior 4.5 months prior 4 months prior 2 months prior As needed
Venue	Identify spaces needed Find appropriate venue Contract for date Communicate specific needs to facility contact Walk through	4-5 months prior 4 months prior 3.5 months prior 2 months prior 1.5 months prior
Hotel	Research local hotels for group rates Sign room block contract	3-4 months prior 3 months prior
Registration	Create and finalize registration form Open and promote registration Close registration	3 months prior 2.5-3 months prior 2-3 weeks prior
Travel awards	Create and finalize nomination process Process nominees Send award notification Provide reimbursement ¹	3.5 months prior 3 months prior 2 months prior As receipts are received
Signage	Work with designer Finalize images Print/create signs Ensure signage in place	4 months prior 3 months prior 1 month prior Day before
Photo/video	Research and select photo/videographer Contract Meet at venue	2 months prior 1 month prior 2 weeks prior
Presenters	Identify with SC Invite Confirm Finalize slides Process travel reimbursement (as applicable) Greet and welcome	3.5 months prior 3 months prior 2 months prior 1 month prior 2 weeks prior 1 hour before event

Promotion	Create marketing plan Disseminate to NCATS and CLIC Create and update website Utilize identified channels	3.5 months prior 3 months prior Ongoing Ongoing
Food / Beverages	Research potential vendors Identify specific needs from registration Contract Confirm Pick up or delivery	3-4 months prior 2-3 months prior 2-3 months prior 1 month prior Day of
Briefing book	Request info with registration Create document Review/finalize document Print document ²	2-3 months prior 1 month prior 1 month prior 2 weeks prior
Evaluation	Create post event evaluation Send post event evaluation Release results Longitudinal follow up	2 months prior Day of 1 month after 3 months after

¹For CLIC supported Un-Meetings, travel award recipients should receive a deadline for submitting receipts. All receipts should be processed and the invoice generated within 60 days of the event.

²An alternative to the hard copy briefing book could be creation of an app or website for all information.

Example 2

Gantt chart project outline available as a downloadable template [here](#)¹.

Item	Owner	Pre-event Month 1				Pre-event Month 2				Pre
		1	2	3	4	1	2	3	4	
<i>Team</i>										
Topic Selection										
Frequency of meetings										
Staffing for event day										
Train staff as needed										
<i>Budget</i>										
Draft budget										
Update as needed										
Finalize with receipts										
<i>Steering Committee</i>										
Identify individuals										
Create and send expectations/invitations										
Schedule meetings										
Meet										
<i>Venue</i>										
Identify spaces needed for reception and event										
Confirm venue and rooms										
Walk thru										
Book										
Contract										
Schedule tables/chairs/linens as needed										
<i>Registration</i>										
Decide max registration #										
Create and finalize registration forms										
Registration open										
Promotion										
Close										
<i>Presenters</i>										
Core team brainstorm										
Identify with Steering Committee										
Finalize with SC										
Finalize expectations of presenters										
Send invitations										

¹CLIC funded teams please note - a slightly more detailed project plan outline will be sent to you with the Notice of Award.

E: Sample “Un-Agenda”

Example 1

7:45 a.m. - Registration / breakfast / networking

8:30 a.m. - Welcome and opening remarks

Martin Zand MD, PhD – Center for Leading Innovation and Collaboration (CLIC)

8:40 a.m. - Framing the issues - 4 slides x 4 minutes (4x4's)

- *Michael Kurilla, MD, PhD, NCATS - Addressing the Opioid Epidemics Through Translational Science: The CTSA Program Role*
- *Redonna Chandler, PhD, NIDA - The Opioid Crisis: When Evidence Based Interventions Fail to Reach Patients*
- *Ken Leonard, PhD, University at Buffalo - The Elder Side of the Epidemic: High and Increasing Death Rates in Older Adults*
- *Christian Thrasher, Clinton Foundation - Providing the Tools and Resources to Ensure Success with Long Term Recovery*

9:00 a.m. – Idea generation & room topic discussion identification

9:45 a.m. - Morning breakout session 1

10:30 a.m. - Morning breakout session 2

11:30 a.m. - Lunch / networking

12:20 p.m. - Re-framing the issues - 4 slides x 4 minutes (4x4's)

- *George Mashour, MD, PhD, University of Michigan - Reducing Opioid Prescribing and Enhancing Disposal: A Preventive Approach*
- *Paul Dougherty, DC, DABCO, Canandaigua VA Medical Center - Whole Health Initiative, the Role of Patient Centered Non-pharmacological Pain Management*
- *Michael Mendoza, MD, MPH, MS, FAAFP, Monroe County Health Department, University of Rochester - Responding to the Opioid Epidemic in Monroe County: A Cross-Sector Collaborative Approach*

12:40 p.m. - Idea generation & room topic discussion identification

1:00 p.m. - Afternoon breakout session 1

1:45 p.m. – Afternoon breakout session 2

2:45 p.m. - Closing remarks

Note: The “un-agenda” above details two 4x4 sessions. Depending on the topic (and number of speakers) a single 4x4 session can drive an entire meeting.

Example 2

TIME	TOPIC & LOCATION	PRESENTER(S)
7:45 AM	Registration/Networking/Breakfast <i>Atrium</i>	
8:30 AM	Welcome and Opening Remarks <i>Auditorium</i>	Martin Zand, MD, PhD Michael Kurilla, MD, PhD
8:45 AM	Framing the Issues <i>Auditorium</i> ➤ 4 x 4 Presentations – 4 slides in 4 minutes	Gang Luo, PhD M. Ehsan Hoque, PhD Chunhau Weng, PhD, FACMI Ram Samudrala, PhD
9:05 AM	Idea Generation / Topic Identification <i>Atrium</i>	Attendees
9:50 AM	Breakout Session 1 <i>Classrooms</i> ➤ 5 concurrent topics based on sorted Sticky	
10:40 AM	Breakout Sessions 2 <i>Classrooms</i> ➤ 5 concurrent topics based on sorted Sticky	
11:30 AM	Lunch / Networking <i>Atrium</i>	
12:20 PM	Framing the Issues <i>Auditorium</i> ➤ 4 x 4 Presentations – 4 slides in 4 minutes	Amar Das, MD, PhD Parsa Mirhaji, MD, PhD Shyam Visweswaran, MD, PhD Erich Huang, MD, PhD
12:40 PM	Idea Generation / Topic Identification <i>Atrium</i>	Attendees
1:10 PM	Breakout Session 3 <i>Classrooms</i> ➤ 5 concurrent topics based on sorted Sticky	
2:00 PM	Breakout Session 4 <i>Classrooms</i> ➤ 5 concurrent topics based on sorted Sticky	
2:50 PM	Reflections & Next Steps <i>Atrium</i>	Martin Zand, MD, PhD
3:00 PM	Adjourn	

F: Sample Communications Plan

Un-Meeting to Address the Opioid Crisis through Translational Science Held June 2, 2018

Email Marketing: Steering Committee outreach– February 15

- *Content*
 - *Planning/feedback questions*
 - *Meeting scheduling*
- *Audience: Steering Committee*

Email Marketing: Save the Date – February 20

- *Content*
 - *Include ad*
 - *Event details*
- *Audience: Hubs*

Email Marketing: Registration reminders – March/April (ongoing)

- *Content*
 - *Include details on registration process*
 - *Communicate through the site/email/newsletters*
- *Audience: Hubs*

Targeted Emails: Nomination/travel award reminders – April (ongoing)

- *Content*
 - *Include details on nomination/travel award process*
 - *Communicate through the site/email/newsletters*
- *Audience: Hubs*

Calendar Updates: University Events Calendar – April 1

- *Post to university event calendar*

Blog: Pre-event Blog Post – May 15

- *Raise awareness and drive participation*

Media: Local Media Outreach – June 2

- *Share comprehensive media package day-of event*

Blog: Post-event Blog Post – June 6

- *Highlight key takeaways*

Social Media: Twitter, Facebook, Instagram (as relevant)

- *Content*
 - *Links to registration*
 - *Highlight theme*

G: Logos and Branding



Color Palette | Primary

These are the primary colors for NCATS products and materials. Pantone 520C is the official Center color from the NIH branding palette. NCATS Teal and Pantone Cool Gray 10C are complementary colors that complete the primary palette.



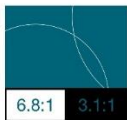
Pantone 520C

RGB: 103.46.107
CMYK: 68.95.27.14
#662E6B



Pantone Cool Gray 10C

RGB: 101.101.106
CMYK: 61.53.48.19
#656569



NCATS Teal

RGB: 0.100.120
CMYK: 92.49.40.15
#006478



H: Example Budget Template

Item	Additional details (i.e. number of travel stipends)	Estimated Cost (\$)	Actual Cost (\$)
Food			
Beverages			
Additional reception costs			
Travel costs (eligible for reimbursement)			
Hotel fees			
Fees for event location			
Photo/videography			
Printing/signage			
Honoraria			
Staff time			
Other			
<i>Overall total</i>			

**Note: Staff/volunteer remuneration and alcohol may be included as in-kind costs at hub discretion, but are not eligible for CLIC reimbursement*

Resources

Budd, A. et al. (2015) Ten Simple Rules for Organizing an Unconference. *Computational Biology*. <https://journals.plos.org/ploscompbiol/article?id=10.1371/journal.pcbi.1003905>

Hall, KL, A. Vogel, B. Stipelman, D. Stokols, G. Morgan, and S. Gehlert. (2012). A Four-Phase Model of Transdisciplinary Team-Based Research: Goals, Team Processes, and Strategies. *TBM*. <https://www.ncbi.nlm.nih.gov/pubmed/23483588>

Rosenkrantz, A. and S. Tridandapani. (2016) The “Unconference in Radiological Society Meetings.” *Academic Radiology*. [https://www.academicradiology.org/article/S1076-6332\(15\)00450-X/abstract](https://www.academicradiology.org/article/S1076-6332(15)00450-X/abstract)

www.Unconference.net