



# GUIDE TO PLANNING THE WESTERN HEMISPHERE SHOREBIRD GROUP CONFERENCE



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## Table of Contents

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|  |    |
|--|----|
| INTRODUCTION   | 1  |
| PROPOSAL TO HOST A WESTERN HEMISPHERE SHOREBIRD GROUP CONFERENCE     | 1  |
| Conference Planning Timeline at a Glance                             | 2  |
| Conference Date  | 2  |
| ORGANIZING AND CONDUCTING THE CONFERENCE                             | 3  |
| Local Committee  | 3  |
| Roles of the Local Committee   | 3  |
| WHSG Executive Committee   | 4  |
| Roles of the WHSG Executive Committee                                | 4  |
| Language   | 5  |
| CONFERENCE VENUE   | 5  |
| Presentation Rooms   | 5  |
| Social Event Rooms   | 5  |
| Side-meeting Rooms   | 6  |
| Accommodations   | 6  |
| WIFI connectivity  | 6  |
| Food   | 7  |
| CONFERENCE FINANCES  | 7  |
| Financial responsibilities of the Western Hemisphere Shorebird Group | 7  |
| Financial responsibilities of the Local Committee                    | 7  |
| Registration Fees  | 8  |
| Conference Insurance   | 8  |
| Sponsors and Fundraising   | 8  |
| Profits and Return of Cash Advance                                   | 9  |
| Publicity and Conference Reminders                                   | 9  |
| Print and Electronic Publicity                                       | 10 |
| Social media   | 11 |
| WHSG and Conference Websites   | 11 |
| Google Drive Conference Account                                      | 12 |
| WHSG and Local Meeting Logos   | 12 |
| PROGRAM BOOK   | 12 |

|  |    |
|--|----|
| CONFERENCE SCHEDULE                                  | 14 |
| REGISTRATION   | 14 |
| Pre-conference Registration                          | 14 |
| On-site Registration                                 | 15 |
| Name Tags  | 15 |
| Name Tag Ribbons                                     | 16 |
| Meals  | 17 |
| SCIENTIFIC PROGRAM                                   | 17 |
| Virtual Conference                                   | 18 |
| Oral Presentations                                   | 18 |
| Poster Presentations                                 | 20 |
| Plenary Speakers                                     | 20 |
| Symposia   | 20 |
| Workshops and Side-meetings                          | 20 |
| Travel Award Program                                 | 21 |
| Lifetime Achievement Awards and Pablo Canevari Award | 22 |
| Attendance Certificates                              | 23 |
| WHSG BUSINESS MEETINGS                               | 23 |
| PUBLIC BUSINESS MEETING                              | 23 |
| SOCIAL EVENTS  | 24 |
| WHSG Alcohol Policy                                  | 24 |
| Opening Reception                                    | 24 |
| Poster Session Reception                             | 24 |
| Coffee Breaks  | 25 |
| Silent Auction                                       | 25 |
| Banquet and Award Ceremony                           | 26 |
| FIELD TRIPS  | 27 |
| TRANSPORTATION                                       | 27 |
| VENDORS  | 27 |
| EARLY CAREER AND MENTOR SOCIAL                       | 28 |
| CODE OF CONDUCT                                      | 28 |
| Code of Conduct for WHSG Conferences                 | 28 |
| Reporting an Incident                                | 28 |
| Disciplinary Action                                  | 29 |

|   |    |
|---|----|
| Retaliation Is Prohibited   | 29 |
| Questions and Appeal  | 29 |
| Investigation Procedure   | 29 |
| POST CONFERENCE RESPONSIBILITIES  | 30 |
| Conference Summary Report   | 30 |
| Conference Report   | 30 |
| Budget Report   | 31 |
| ACKNOWLEDGEMENTS  | 32 |
| Appendix A. Application to Host the Biennial Conference of the Western Hemisphere Shorebird Group | 33 |
| Appendix B. Financial Agreement between WHSG and Host Organization                                | 37 |
| Appendix C. Committee Task Assignments and Organizing Timeline                                    | 38 |
| Appendix D. Sample Sponsorship Application  | 41 |
| Appendix E. Sample Email Announcement: Opening of Conference Registration                         | 42 |
| Appendix F. WHSG Organization and Conference-specific Logos                                       | 44 |
| Appendix G. Sample Email Announcement: Call for Papers, Symposia, and Side-meetings               | 46 |
| Appendix H. Sample Travel Awards Program Application Materials                                    | 47 |
| Appendix I: Lifetime Achievement Awards Nomination Guidelines                                     | 53 |
| Appendix J. Example Participation and Presentation Conference Certificates                        | 54 |
| Appendix K. Silent Auction Bidding Form   | 56 |

## INTRODUCTION

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The Western Hemisphere Shorebird Group (WHSG) holds a biennial conference where participants present the results of biological research and conservation projects, and the group's business is conducted. In addition, many groups, such as the shorebird flyway conservation initiatives (Atlantic, Pacific and Midcontinent), working groups (species-specific and topic-based) and the Western Hemisphere Shorebird Reserve Network (WHSRN), hold side meetings before, during or after the conference. It is also an opportunity to offer trainings (e.g., shorebird banding and certifications, statistics workshops, etc.) and specialty workshops (e.g., how to write a scientific paper, study methodology, etc.) are held. Equally important are the social events that take place during the conference (e.g., Silent Auction), permitting personal contacts among like-minded shorebird enthusiasts. Students and early career professionals, especially, benefit from having the opportunity to meet and learn from experts in the field and generate new contacts for future collaborative projects

WHSG conferences occur across the Western Hemisphere. Conferences have been held in Panama, Peru, United States, Canada, Colombia, Mexico and Venezuela. To promote attendance and enhance membership, WHSG endeavors to hold its biennial conference in an alternating fashion between North, Central and South America so as to allow easy access to people from a variety of locations throughout the Western Hemisphere.

The WHSG conferences are generally held in isolation of other groups, with only the second meeting held in conjunction with the Neotropical Ornithological Congress in 2007. The WHSG Executive Council decided that future conferences should be held independently to allow sufficient time for all shorebird-related items (e.g., the 2007 conference only had a few symposia on shorebirds). This decision has proved wise as the WHSG conference has grown tremendously and currently covers six days.

WHSG conferences are hosted by a Local Committee, which is responsible for the planning and implementation of the conference. The WHSG Executive Committee and other parties involved in past conferences provide additional guidance and support. Hosting a WHSG conference is a challenging and rewarding experience that the WHSG entrusts to a Local Committee every two years. This guide provides information to prospective and current Local Committees to understand the full process of hosting a WHSG conference. Ideally, at least one person in a leadership role on the Local Committee has had the experience of attending a WHSG conference. If not, WHSG strongly encourages one or more persons involved in planning a conference attend at least one WHSG conference prior to proposing to host a conference.

Questions regarding this document or other matters regarding hosting an WHSG conference should be directed to the WHSG Chair and Conference Chair (contact information available at: <http://westernshorebirdgroup.org/about-us/>).

## PROPOSAL TO HOST A WESTERN HEMISPHERE SHOREBIRD GROUP CONFERENCE

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The WHSG Chair or WHSG Conference Chair should send out an announcement at least 6 months prior to an upcoming conference requesting submissions to host the next conference. Potential Local Committees should submit their proposal (see Appendix A) to hold future WHSG conferences at least

one month before the start of an upcoming conference. Ideally, the date and location of a future conference, or perhaps the next two conferences, should be decided during the business meeting so that the date and location can be announced during the conference banquet.

For prospective Local Committees, the first step in preparing to host the conference is to submit an application to the WHSG Chair and WHSG Conference Chair (or WHSG Staff Member if no Conference Chair is present) inviting the membership to hold its biennial conference at a particular place and date. This application should only be completed after consultation between the prospective Local Committee and the WHSG Conference Chair to affirm the location and date are feasible. Assistance with completing the application is available through this conference guide and through communications with the WHSG Conference Chair. Briefly, essential information to provide in the application includes:

- Group affiliation(s)
- Local Committee Chair(s)
- Proposed Conference dates
- Symposium and/or workshop ideas
- Proposed venue (conference meeting facility and sleeping rooms)
- Accessibility to the venue by air, etc.
- Conference income and expense estimates
- Profit/loss allocations between WHSG and host organization(s)

All applications to hold a conference must be approved by the WHSG Executive Committee, which can accept the proposal as written; accept the proposal with revisions; or decline the proposal. If the proposal is accepted, a written Financial Agreement (Appendix B) is prepared by the WHSG Conference Committee Chair in collaboration with the Local Committee Chair. The Financial Agreement is signed by the WHSG Treasurer and Local Committee leadership. This agreement specifies the financial responsibilities of the Local Committee and WHSG (see CONFERENCE FINANCES, this guide).

## Conference Planning Timeline at a Glance

A Local Committee hoping to plan a WHSG conference needs to be particularly aware of the following significant events and dates. Details of each of these factors are presented later in this guide.

| Event   | Time before the conference begins |
|---|-----------------------------------|
| Submission of proposal to WHSG Chair and Conference Chair to host a conference <sup>a</sup> | 2-3 years                         |
| Selection of a conference center and/or hotel <sup>b</sup>                                  | 2-3 years                         |
| Reservation of conference center and hotel rooms <sup>b</sup>                               | 1-2 years                         |
| Public announcements of the conference <sup>b,c</sup>                                       | 1 -2 years                        |

<sup>a</sup> Proposal submitted through completion of *Application to Host the Biennial Conference of the Western Hemisphere Shorebird Group* (Appendix A).

<sup>b</sup> Do immediately after approval to host the conference has occurred.

<sup>c</sup> See Appendix E for various announcements that need to be made throughout the conference, and Table 1 (pg. 9) of the guide for likely locations to make such announcements.

## Conference Date

The preferred conference dates are typically in September-November or March-April to reduce conflicts with field research activity in the Northern or Southern hemispheres. Organizers should be

mindful of religious and other holidays throughout the Western Hemisphere. An internet search will reveal religious and other holiday dates to be avoided anywhere in the world in a given year. Dates to avoid include U.S. Thanksgiving, Canadian Thanksgiving, the Jewish holiday Rosh Hashanah and all Catholic holidays (Christmas, Easter).

The Local Committee, when choosing the dates for the conference, should check the timing of other related ornithological or wildlife conferences to avoid conflicts. Leaders of likely smaller ½ day or 1-day meetings should be contacted about potential meeting dates and encouraged to hold their meetings in concert with this conference (e.g., Atlantic, Midcontinent or Pacific Shorebird Conservation Initiatives; Western Hemisphere Shorebird Reserve Network Executive Committee).

## ORGANIZING AND CONDUCTING THE CONFERENCE

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An overview of roles and responsibilities of the Local and the WHSG Executive Committees are outlined below. See Appendix C for committee task assignments.

### Local Committee

The size of the Local Committee will vary from conference to conference, depending upon the expected size of the conference (150-300), conference venue and logistics, and the availability of local people to assist with planning. The conference has been hosted at many types of facilities including a field station, university, and hotel conference facilities. Big groups of volunteers (20-40) volunteers are needed to host the conference including the registration desk, audio-visual support and other tasks. Conference attendance is increasing, with the last meeting holding up to ~280 participants.

Typically, a committee of ten- fifteen individuals is sufficient to undertake all essential tasks. Committees of 2-3 people are too small to accomplish all tasks and applications lacking sufficient staff members will not be approved. One individual who is responsible for overseeing all activities and financial matters will chair the Local Committee. A vice-chairperson should be aware of the chairperson's duties, the overall activity of the committee, and be able to assume responsibilities in case the chairperson is indisposed.

There are several fixed subcommittees that help make the conference a success. These include the Scientific, Travel Award, Lifetime Achievement Award, Finance, and Student subcommittees. Their function is described below within a variety of sections. The conference host(s) may hire a professional conference planning service or an individual to complete some of these tasks, with fees paid from the conference budget.

### Roles of the Local Committee

**Conference Chair:** provides oversight of all conference planning including logistics, scientific program and financial matters. Provides general oversight of the conference organizing and appoints subcommittee chairs (e.g., Travel award, lifetime achievement awards, workshops, etc). Leads daily announcements during conference.

**Finance Subcommittee Chair:** works closely with the WHSG Treasurer to create budget, negotiate service and venue contracts. Manages conference income and expenses and balances all conference budgets. Provides guidance on registration rates, expenditures for the Travel Award Program, and field trips. May serve as chair of one of the subcommittees listed below.

**Scientific Subcommittee Chair:** Organizes the scientific program including paper presentations, symposia, poster session. Recruits scientific committee members and assigns tasks for reviewing and selecting abstracts and symposia. Works closely with Conference Chair to select Plenary Speakers.

**Travel Award Subcommittee Chair:** organizes the award of travel funds to applicants including flights, food and lodging stipend. Works with Finance subcommittee chair that the travel award program is efficient with funds and does not go over budget. Provides information and support for international travel visas.

**Lifetime Achievement Award Subcommittee Chair:** Sends out nomination information to the WHSG community, receives the completed nominations, creates a selection committee and delivers the award at the conference banquet. Facilitates the cash award and commemorative gift for the winners. Helps organize communications around the award itself and the biography of the recipients.

**Communications Subcommittee Chair:** will circulate information about conferences via their local listservs, Facebook, Twitter, and Instagram, WhatsApp connections; they can also serve as chairs of one of the subcommittees listed below, manage the conference's website, or other tasks. Work with the local registrar to prepare conference attendance certificates for all participants.

**Student Subcommittee Chair:** will help facilitate the Student-Mentor Social Event and organize the Silent Auction during the conference.

## WHSG Executive Committee

The WHSG Executive Committee will be responsible for (1) assisting in organizing and planning conferences, (2) soliciting and assembling agenda items from group members to be presented at WHSG conferences, and (3) collectively prioritizing needs and helping to get work accomplished.

The Executive Committee is composed of eight individuals and a Chair, representing various diverse backgrounds and interests in shorebird conservation. Besides the Chair, the Executive Committee includes a Secretary, Treasurer, the past Chair, a graduate student studying shorebirds, and a representative from each of the following portions of the Western Hemisphere: Canada and the United States, Mexico and Central America, Northern South America, and the Southern Cone of South America. There is a potential to add a Conference Chair to fulfill the duties listed below. The current members of the Executive Committee can be found here:

<http://westernshorebirdgroup.org/about-us/>

## Roles of the WHSG Executive Committee

**Conference Chair:** provides advice and general information on holding of the conference based on past conferences; provides general oversight on whom the local committee should be working with for various subcommittees (e.g., Travel award, lifetime achievement awards, workshops, etc), (there is no Chair at present). In the absence of a Conference Chair, most of these duties fall to the Chair and Staff person.

**Chair:** provides advice and general information on holding of the conference based on past conferences; leads business meeting during conference, and provides overview of status of the WHSG to participants at the conference

**Staff person:** provides advice and general information on holding of the conference based on past conference; works to ensure final report is completed and published from each conference; may serve as chair of one of the subcommittees listed below, works with Treasurer to update WHSG website with links to relevant conference information.

**Treasurer:** provides information on funds available to support the conference, and help to transfer funds to and from the Local Committee; may serve as chair of one of the subcommittees listed below.



**Secretary:** will report on past business and collect notes during business meeting held during each conference; may serve as chair of one of the subcommittees listed below.

**Regional Representatives:** will circulate information about conferences via their local listservs, Facebook, WhatsApp connections; they can also serve as chairs of one of the subcommittees listed below, manage the website, or other tasks. Work with the local registrar to prepare conference attendance forms for all participants.

**Student Representative:** will help facilitate the Student-Mentor Social Event and organize the Silent Auction during the conference.

**Entire Executive Committee:** reviews applications from potential Local Committees to host future conferences.

## Language

The Western Hemisphere Shorebird Group is committed to reducing language barriers within our group. Since 2009, we have coordinated bilingual (English and Spanish) translations of conference materials (pre-meeting communications, abstract and program book). The Local Committee and Scientific Subcommittee have managed this work. During the conference, we have hired 2-3 people to provide simultaneous audio-translation during the scientific program. The number of translators required depends on the number of concurrent sessions (typically 3). A translator will be needed in each room where scientific presentations are occurring. It is also important to schedule the translators for the plenary speakers, opening remarks for the conference, side-meetings and any formal event where information is shared. For example, we likely don't need translation support for silent auction, poster session, social events. To date, we have worked with one person who hires additional translators to meet our needs. It is the responsibility of the Local Committee to provide the translators. This includes purchasing their airfare, facilitating their ground transportation, accommodations, food stipend and negotiating professional services fees.

## CONFERENCE VENUE

WHSG conferences need facilities for scientific presentations, both oral and poster; space for coffee breaks and vendor displays; space for registration and associated tables; and a room large enough to seat all of the participants for the opening of the conference, plenary speakers, and business meeting (150 to 300 people). It is highly desirable to choose a conference facility that has a variety of restaurants, hotels and other amenities within easy walking distance. Amenities benefit conference attendees and their families who may travel with them. Venues used in the past have included a university, a field station, and private hotels with conference capacities. Local organizers who were able to use public facilities (university or a field station) were able to have less expensive registration costs.

### Presentation Rooms

For the scientific sessions, most WHSG conferences need at least three lecture rooms for presenting oral papers. These rooms must accommodate at least 75 people each (or more if conference registration dictates), be close together, and be suitable for PowerPoint presentations (i.e., be capable of being sufficiently darkened) and translation audio services (i.e., have a location where translators can sit at the back, hear well, and distribute audio equipment to participants). There must also be a much larger room that can accommodate all participants (sometimes the larger room can be partitioned into three smaller 75-person rooms).

### Social Event Rooms

Social events will require a large room for the ice-breaker reception, the poster reception, and the banquet. Ideally, coffee breaks are often held in a lobby near the Presentation rooms.

## Side-meeting Rooms

Frequently side meetings and workshops are held prior to, during, and after the conference. These events may be held at a different venue but should be fairly close to the main conference hotel. The size of the meeting room, the need for coffee and snacks, and method of payment to secure the room and services should be paid separately from the main conference registration fee. These side-meetings / workshops are important to the conference however so assistance to groups holding these events should be a priority.

## Accommodations

Most WHSG conferences will attract from 125-250 participants and most are held in hotels or hotel/conference centers. Having sleeping rooms and scientific and social sessions under the same roof has many logistical advantages. It can also have economic advantages for the Local Committee. Registrants should be encouraged to stay at the conference hotel as many hotels offer reduced rates on meeting rooms based on the number of sleeping rooms used by conference participants. The best solution, particularly for students, is for the Local Committee to negotiate a flat rate for 1-4 people per sleeping room. Often one or more sleeping rooms are made available at no charge (Complementary Rooms) by the hotel as certain thresholds are met for registrants staying overnight. Cheaper conference rates may be possible and should be pursued by the Local Committee. If offered, a contract between the financial representative of the Local Committee and the conference hotel must be signed, specifying nightly rates for sleeping rooms, the number of rooms to be made available at those rates, dates by which rooms must be reserved in order to obtain the conference rates, and the number of rooms needed to be reserved in order to acquire discounts on meeting rooms. Such contracts might also include visual equipment, screens, and coffee/snacks. Conference registration materials should suggest that registrants contact the Local Committee if they encounter difficulty in getting discounted room rates before the deadline closes for these.

If the conference locale is a university, residence halls may be available at inexpensive rates. This usually means that the conference must be scheduled when the university is not in session. Youth hostels, Air B&Bs and other options should be explored as a way to provide cheap housing for travel award winners.

It may benefit some attendees to have information on campgrounds and some alternative hotels or motels in the vicinity. A communal bunkhouse for those on fixed incomes could also be an alternative lodging option arranged by the Local Committee. However, it is usually in the best interest of both the Local Committee and conference participants to encourage all participants to use the conference hotel for their housing providing that the Local Committee can negotiate a reasonable room rate.

In some locations and venues, it may be necessary to reserve a block of sleeping rooms two years or more in advance to ensure adequate quantities of rooms are available for attendees and to ensure the desired dates are available. This is particularly true of tourist destination locales or cities that host a large number of conference and professional meetings. The local chamber of commerce or convention and visitor's bureau usually can provide a complete list of conference booking dates as well as information on peak tourist times. Local convention and visitors bureaus may also be able to assist the Local Committee with bids from appropriate hotels.

## WIFI connectivity

Internet/WIFI should always be available during the conference and an effort should be made during negotiations for the conference venue for attendees to have access to free WIFI throughout the conference. It is also important to include login-in credentials (WIFI name and password) to participants during the registration in the conference booklet or have it posted in rooms.

## Food

Coffee and beverage service is needed during breaks within the scientific program, and for special events such as the opening reception, silent auction, poster session and banquet. Many of these services may be provided by the conference hotel or can be obtained through outside vendors. These items should be negotiated with the hotel rates if possible.

## CONFERENCE FINANCES

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The main goal of the Local Committee when hosting a WHSG conference is to conduct a quality meeting. That said, the Local Committee must demonstrate careful oversight of conference income and expenses. Every effort must be made to avoid financial losses, as there are little reserves to help should a loss occur. The financial goal is to keep costs low to participants, while aiming to ensure income exceeds expenses (e.g., \$5,000 USD). This approach provides a margin of error to avoid a loss from unforeseen circumstances (e.g., conference cancellation and deposits lost, violence in host city, pandemic).

During the application process for hosting a WHSG conference, a Financial Agreement is negotiated and signed between WHSG and the Local Committee ([Appendix B](#)). This process should include a discussion of how profits or losses will be dealt with after the conference.

### Financial responsibilities of the Western Hemisphere Shorebird Group

The WHSG Executive Committee (led by the Treasurer) will discuss with the Local Committee the possibility of providing funds in advance to pay for expenses that are due before registration fees become available. This may include money to reserve meeting space and to establish contracts with vendors that will provide necessary services for the conference. In all cases the WHSG Executive Committee will authorize any advance funding to the Local Committee needed to start the process of holding the conference. The Local Committee must realize that the WHSG Executive Committee does not have a large savings account to help pay for the conference and that any funds provided by the WHSG Executive Committee will hopefully be returned to help future Conference organizers. Thus, it is incumbent on the Local Committee to work with the Finance Subcommittee Chair (see below) to help raise sponsorship funds to hold each conference.

### Financial responsibilities of the Local Committee

To ensure adequate budgeting for the conference, the Local Committee must prepare a budget to be presented to the WHSG Conference Committee Chair 12 months prior to the conference. As a starting point, the Local Committee should use the budget presented in their initial application submission. Since this budget would have been created 2-3 years before the conference, income and expense items will likely require revision. The Local Committee should work with the Conference Committee Chair and Finance Subcommittee Chair to set the registration fee and other fees that will ensure adequate funds are raised to hold the meeting. The Local Committee is responsible for establishing and adhering to the budget, including setting registration and other fees, coordinating collection of fees, and making all disbursements to travel award winners and vendors providing services for the Conference. The Local Committee is also expected to raise additional funds from local sponsors to support of the conference. The Local Committee will also keep a detailed and accurate account of all income and expenses, and include this in the conference report due two months after the conference.

The Local Committee should establish a checking account with a local bank that does not charge bookkeeping fees to non-profit organizations, if possible. Alternatively, the Local Committee may have its own in-house checking and credit card capability.

## Registration Fees

A considerable portion of the conference income is from registration fees paid by participants; the WHSG Conference Committee Chair and Finance Subcommittee Chair should be consulted when registration fees are set and an overall conference budget should guide the registration fee cost and structure. The Local Committee must set the fees to ensure sufficient income, while keeping fees low enough so that they do not discourage attendance, especially by students. The schedule of registration fees should include a lower early registration fee (to encourage early financial commitments). There should be a higher rate for professionals and a less expensive rate for students. Accompanying spouses or 'significant others' who will attend only social functions should be assessed only the costs of these functions. A one-day participation rate may also be offered at the on-site registration desk for locals attending the conference for a limited time.

The Local Committee can encourage pre-registration by increasing the registration fees for all categories of participants as the conference time draws closer. Registration deadlines should be announced well in advance.

Each year a few registrants cancel plans to attend the WHSG conference. The Local Committee should develop a refund policy for cancellations. The policy should be posted on the conference website along with other conference information as registration begins. Typically, full refunds (minus some minimal [15%] administrative fee) are given to participants if notified within 30 days of the conference start. Also, consider refunds at 15 days can be 50% refunded, and 7 days before the event, no refunds will be processed.

Conference registration will be organized by the Local Committee (on-line registration with payment method, attendance records, event management, abstract submissions, etc.). Electronic payment options are critical for registration and the LC should prioritize early in the organizing how payments can be made. This is especially important for conferences hosted in Latin America because of the difficulties in international payments. The Local Committee will be expected to coordinate with the Finance Subcommittee chair. Typically, the average transaction fee for credit cards is 2.9-3.0%, this should be accounted for by increasing the amount of registration fees to cover this cost. It is up to the Local Committee to determine the fiscal deadlines for hotel and catering deposits and confirm a deposit schedule prior to the start of registration.

Ideally, the Local Committee should allow registration fees to be paid by credit card via the on-line registration, and by cash at the conference venue. The Local Committee should also be prepared for some registrants that will need to split charges between two payment methods (or separate credit cards) to cover costs for conference registration, banquet, and/or field trip fees (e.g., a registrant's agency may not pay for field trips but will pay for registration). More affordable payment options for locals may be considered.

## Conference Insurance

The Local Committee should investigate the purchase of conference insurance policies that refund initial deposits for conference venues and other vendors if the conference is cancelled for unforeseen circumstances (weather, political conflict, pandemic, etc.). This may be warranted in situations where large deposits are required for hotels or facilities.

## Sponsors and Fundraising

To hold a high-quality conference while keeping registration fees at an affordable level, outside funding is essential. The Local Committee should approach local foundations, corporations, government agencies related to the environment, nature societies, and federations for support.

Often, the Local Committee may ask for funding or an in-kind contribution for a specific part of the conference.

In-kind contributions may take many forms. For example, this might include volunteer time by local people (e.g., members of the Local Committee or a local birding group or university) to run the registration table at the conference. An agency might agree to pay for the printing for the conference program, or a corporation / state department might agree to fund a social event like the ice-breaker, poster reception, or the Friday night social event. A university might agree to donate the use of audiovisual equipment or use of vans for field trips. All of these are significant conference expenses. Applications for external funding should be made very early in the conference planning process because they often take a long time to process.

Besides Local Committee efforts, the Finance Subcommittee is responsible for helping to raise funds to cover conference costs, but in particular to pay for travel awards. The Finance subcommittee is led by a volunteer Chair, who should be approved by the Local Committee as soon as possible after the proposal to host the conference is accepted. The Chair should invite others to participate on the Finance Subcommittee based on input from the Executive Committee and the Local Committee, and the ability of participants to fund raise. The Finance Subcommittee Chair will coordinate obtaining funds originating from various federal and state agencies, foundations, and non-profit government organizations.

The Finance Subcommittee will also help raise funds from sponsors located geographically distant from the conference site. Such sponsors might include telemetry equipment, audio, and field gear companies. Sponsor contributions may be enhanced through creating incentives for contributing larger amounts of money. This could include the creation of 'fixed' donation categories, wherein sponsors are offered various levels of publicity, with the amount of publicity increasing with donation amount (see example, Appendix D). In every situation, sponsors should be recognized in Conference materials and the website.

Selling items with the WHSG logo can be another way to raise funds. T-shirts, caps, coffee mugs, and tote or laptop bags are examples. Ideally, people registering for the conference should be asked to indicate items they wish to purchase and pay for these at the time of registration. This approach assures that the correct quantity of items are purchased ahead of time.

## Profits and Return of Cash Advance

Within one month after the conference, a final budget should be completed showing revenues and expenses for the conference. Assuming the conference showed a positive balance, the cash advance provided by the WHSG at the start of the conference should be forwarded to the WHSG savings account at the International Conservation Fund of Canada (via the WHSG Treasurer). Similarly, any additional profit should be moved to WHSG as agreed upon in the financial agreement to support future meetings (Appendix B).

## Publicity and Conference Reminders

It is very important to publicize a conference early and widely to reach as many potential attendees as possible. People traveling long distances need to know 1-3 years in advance of the conference location and date. As soon as possible after the WHSG Executive Committee has approved the conference, the WHSG staff member should post an announcement on the WHSG website conference page (see [here](#)). Besides these "save the date" notices, reminder email announcements should be sent prior to upcoming conference deadlines (registration, student travel awards, abstract submission, etc.) (See table below).

Publicity for conferences is a group effort, involving coordination and collaboration between the Local Committee and the WHSG Executive Committee (especially the Conference Chair). It is

recommended that one person on the Local Committee take responsibility for posting initial and subsequent postings on international sites (e.g., see below). Regional WHSG Executive Committee members should be asked to spread the word in their region. The Local Committee should announce the conference locally and regionally to non-members to increase participation in the nearby area. Typically, participation by locals can make up 1/3 or more of the attendees. Securing registration fees from these people can help make the conference a success.

Table 1. Suggested schedule for sending public announcements out.

| Prior to conference                                 | Announcement  |
|---|---|
| 2 years and reminders immediately before conference | Notice that conference is scheduled with basic info (date, location, local organizing committee). Save the date |
| 9 months  | Travel awards   |
| 9 months  | Scientific program: abstracts, symposia, side-events  |
| 9 months  | Lifetime achievement award nominations  |
| 6 months  | Early Registration  |
| 1 month   | Late Registration   |

### Print and Electronic Publicity

- Email announcements to WHSG members – WHSG Conference Chair and the Local Committee can send emails to members by simply posting a message to [whsg@lists.fws.gov](mailto:whsg@lists.fws.gov) (see Appendix E, for an example). A specific email should be sent to all of the WHSG Executive Committee members so they can forward on to regional list servers or other means of communication.
- *Wader Study* – the journal of International Wader Study Group is published three times per year (April, Aug, Dec). Each journal has a “Notes & News” section where conference information can be posted. Wader Study members receive email alerts and hard copies of the journal. There is also a “News” section on the International Wader Study Group website located [here](#)
  - 2 years before conference, each issue of *Wader Study* should include at least one paragraph describing the conference (dates, location, members of the Local Committee) and a link to the conference website. This is particularly important to also include in the issue that is about 1 year prior to the conference.
- Postings should be made in other prominent ornithology and conservation websites / on-line list serves, including the American Ornithological Society, the Association of Field Ornithologists, the Wilson Ornithological Society, the Wildlife Society, the Neotropical Ornithological Society, and regional groups (e.g., Alaska Shorebird Group)
- Press Releases - One month before the conference, local news media (newspapers, television, and radio stations) should be sent a press release. This should include the basic information related to the conference: who, when, where, and why. It should also invite local participation. Within one week of the conference, follow-up phone calls can better insure media coverage. Depending on the interest of local media, a press conference may be scheduled during the conference to allow the media to interview the Local Committee, the WHSG executive committee members, and shorebird experts attending the conference. Keep in mind that there will be experts arriving from throughout the Western Hemisphere, and occasionally other parts of the world.

- State and regional websites and newsletters of non-profit organizations in the region where the conference will be held are also good locations for posting news about the upcoming conference.

## Social media

The Local Committee is encouraged to use social media to showcase the conference. Use of the WHSG Facebook account (<https://www.facebook.com/groups/84783206872/>) is encouraged to advertise the Conference, relay events happening during the conference, and announce products from the conference. There is also a WHSG Conference Facebook account (e.g., <https://www.facebook.com/WHSG2019>). Local organizing committee can request administrative privileges to both accounts via the WHSG Conference Chair. Local committees typically set up a Twitter hashtag for the meeting for example: #WHSG2019.

## WHSG and Conference Websites

The Local Committee is responsible for building and hosting a bilingual conference website of their own. The WHSG staff member maintains general information on the overall WHSG website and will link to each conference website.

Conference website should include the following categories and subcategories:

- About – link to the general WHSG website
  - Local Committee – list main person and their contact information
  - Official language of country
  - Climate and time zone information
  - Electricity type at site
  - Currency
  - Health information
  - Local travel options
  - Disclaimer of liability to Local Committee organizations
- Program – highlight keynote or plenary speakers, and eventually the program book (downloadable)
- Conference Venue and Accommodation
  - Information on conference venue (e.g., location)
  - Information on sleeping rooms at conference venue
  - Information on other sleeping room locations
  - Costs for rooms and food in all places
  - Map showing location of all places relative to conference venue / sleeping hotel
  - Links to all places
- Travel Information
  - Suggested airport to use for attending conference, other travel alternatives
  - Suggested means to travel from airport to conference (include options and costs)
  - VISA information
- Courses, Workshops and Side Meetings
  - Each item should include general information, contact person, cost, how to register, and whether it is open to all
- Lifetime Achievement Award Information
- Registration
  - Dates of early and late registration and associated fees during each of these dates for students, professionals; text that indicates whether one-day registration is available to local participants should be here.



- When registration is open, the site should include a mechanism to register and pay fees on line
- A formal registration template should be developed that includes all relevant questions (e.g., ways to register for general and side meetings, field trips, whether banquet or other costs are covered, etc.)
- Field Trips
  - Each available field trip should be described, with dates and times and costs.
  - Sometimes participants may need to contact outside vendors to make these arrangements – and fees will not be in the registration document. Arrangements and payment method should be clear on website.
- Symposium and Abstract submissions
  - Dates and submission process for submitting ideas on hosting courses, workshops, and side meetings
  - Dates and submission process for submitting general abstracts to the meeting
  - Once symposium have been accepted they can be advertised here; same goes for courses, workshops, and side meetings
  - Include templates people must fill out for submitting symposium ideas

In addition, the website cover page should prominently display information about how to become a sponsor, information on how to bring materials for the Silent Auction, and eventually all the logos from the Local Committee Institutions and the Sponsors to the meeting.

### Google Drive Conference Account

We have a Google Drive and email account ([WHSG.conference@gmail.com](mailto:WHSG.conference@gmail.com)) set up for the conference organizers that can be transferred between years and organizers. The WHSG Conference Chair, WHSG Chair and WHSG staff member have the login in credentials. We also created an archive of files related to conference organizing that includes the following collection of materials:

- Logos
- Travel award application documents
- Program books
- International Wader Study Group Conference Reports
- Announcements
- Draft budgets

### WHSG and Local Meeting Logos

Electronic files of the WHSG and of past WHSG Conference logos are available in .jpg, .ai, and .cdr format and have been stored on the Google Drive and are shown in Appendix F. The Local Committee is encouraged to develop an event-specific logo to promote the conference. Logo design should consider appearance (readability, visual appeal) on printed programs and merchandise.

## PROGRAM BOOK

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The Local Committee will prepare an electronic version of the Program Book that will be sent to registered people via e-mail at least one week prior to the conference. Participants should be encouraged to download the Program book for use on their own electronic device during the conference. They can also make their own hard copy or have one produced for them for a small price (to be paid as part of registration process and acquired at conference registration desk). Participants should be told in advance that no (or a limited number of hard copies) will be available at the



conference. This approach saves the Local Committee funds but does require that the Program Book is completed at least one week in advance (preferably sooner) so it gets to people before they initiate travel to the conference. Conferences that are no longer printing programs are using applications on smart phones that list the program in a way that is readable, local committees may consider exploring this option and including the expense in registration fees.

In addition, the Program book must prominently display the WHSG logo on the cover in addition to logos for the Local Committee organizations. It is also necessary to display sponsor logos inside the book, near the front. For guidance, an archive of past program books can be found on the Google Drive.

The Program Book contains a detailed schedule of scientific, social, and business sessions as well as abstracts of all papers to be presented. If concurrent scientific sessions are held, the schedule should be arranged so that concurrent sessions can be compared easily. The Program Book lists the names of the Local Committee, the WHSG Executive Committee (see [here](#)), conference sponsors, vendors, and conference volunteers. The book also contains information useful to conference participants, such as the location of meeting rooms (both general and side meetings/workshop rooms) in the conference venue and guide to local restaurants in walking distance from the hotel.

## CONFERENCE SCHEDULE

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WHSG conferences typically run from Tuesday through Sunday. There is some flexibility with this schedule, particularly for WHSG conferences away from North America. With minor variation, the standard format for WHSG conferences is:

| <b>ORDER</b> | <b>EVENTS</b>  |
|--------------|--|
| Day 1        | Registration (late afternoon/early evening)<br>Workshops / side meetings (and/or on day 7)<br>Flyway Initiative meetings (and/or on day 7)<br>WHSRN Executive Council meeting (or on day 7)  |
| Day 2        | Registration all day<br>Workshops / side meetings<br>Closed door Business meeting<br>Ice-breaker social event in evening   |
| Day 3        | 1 <sup>st</sup> official conference day<br>Registration all day<br>Plenary address<br>Scientific paper sessions all day<br>Symposia, if scheduled<br>Poster session and social reception in evening  |
| Day 4        | 2 <sup>nd</sup> official conference day<br>Registration all day<br>Plenary address<br>Scientific sessions all day<br>Symposia, if scheduled<br>Silent Auction and social reception in evening  |
| Day 5        | 3 <sup>rd</sup> official conference day : Field trips  |
| Day 6        | 4 <sup>th</sup> and Final official conference day<br>Registration (few hours in morning)<br>Plenary address<br>Scientific paper sessions all day<br>Public Business meeting – open to all (late afternoon).<br>Banquet, Awards and Closing Ceremony in evening |
| Day 7        | Flyway Initiative meetings / workshops / side-meetings (and/or on day 1)<br>WHSRN Executive Council meeting (or on day 1)<br>Additional days if needed for side-meetings   |

## REGISTRATION

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### Pre-conference Registration

Pre-conference registration is very important to the Local Committee for estimating the size and number of meeting rooms to reserve, and the quantities of programs, food, conference freebies (e.g., t-shirts), and other supplies to procure or reserve. Early registration also provides an important source of advance funds needed to prepare for the conference. It is to the advantage of the Local Committee to do whatever it can to encourage early registration. One way to do this is to provide a significant savings on the registration fee for early registration. The Local Committee typically sets a two-stage registration with the fees increasing at each deadline as the conference date approaches.

Some attendees will always register at the last minute by mail or in person at the conference. Local participants should also be allowed to register for a single day.

## On-site Registration

While steadily increasing registration fees at regular intervals in the months leading up to the conference discourages on-site registration, for a variety of reasons some attendees wait until conference time to register. The registration process at the conference is very important because if it proceeds smoothly and quickly, a favorable tone is set for the conference. The registration desk should be in a prominent, easily accessible location with plenty of room for people and materials. Depending on the configuration of the conference center, the registration table may be set up in the lobby or share a room with the vendor displays. Registration should begin in late afternoon of Day 1; this allows attendees to register for workshops scheduled for Day 2. Registration should remain open throughout the conference, including a few hours during the last morning of paper sessions. On full days, the desk should be open from 7:30 AM to 5:30 PM.

A registration package should be prepared in advance for each person pre-registered containing name tag, name tag ribbon (if appropriate, see below), tickets for special dinners and events, receipts, and promotional material. Program books should be available for those who paid for them during registration, or available for a small cost for those that forgot to download or print a version. Also, any last minute changes in the program schedule should be printed hard copy to hand to people. Other information helpful to registrants that may be provided include: local maps and public transportation guides and locations of restaurants, banks, drug stores, and medical facilities. Often the city, Local Committee organization, or even a government fish and wildlife department will supply folders at little or no cost for the registration materials. Additional packages should be prepared for walk-in registrants. The Local Committee should carefully consider how much material is needed for participants and be mindful of waste. Think twice before spending limited finances on Conference Swag that will likely be thrown away by many people.

The registration desk should have a calculator, receipt book, the ability to accept credit cards for payment, cash box with money for change should people wish to use cash to buy Conference items or programs, and a computer and printer for printing receipts. A laptop with access to the online registration website is critical for processing credit card transactions. Internet/WIFI should always be available during the conference.

For efficiency, packages for people who are pre-registered should be divided into alphabetical segments with a person per segment to distribute them. It is helpful to have a separate space in the registration area for those registering late on conference days.

The registration area should also include a message center where news and information may be posted, and banquet and field trip tickets may be exchanged. Here information is available at a glance. Early on during the conference, it is helpful to have a few 'locals' present to direct attendees to specific shops, restaurants, museums, parks, bird-watching trails, and natural or historic sites. Early morning bird walk have been popular in the past.

## Name Tags

Name tags for conference registrants are very important and should be easily readable at distances of 4-6 ft. (1.2-1.8 m). Stick-on tags should not be used because they are not suitable for prolonged use, nor should tags using safety pins be used. The best tag has an acetate pouch for the label and either a lanyard/necklace or clip for attachment. The conference name and logo are not needed on the name tag but if used, should not take away from the size of the text used for names. Formatting the first name in 48 size font (actual size below) or larger is ideal for easy name recognition.

# First Name

First and Last Name

Affiliation

## Name Tag Ribbons

WHSG Executive Committee as well as Local Committee members should be easily identifiable by different colored ribbons attached to the name tag as listed below. Be sure to provide pronouns options: *he/him/his*, *she/her/hers*, and *they/them/theirs*. Ribbons typically have an adhesive that attaches them to the bottom of the name tag.

Ribbons for “Moderator” or “Presenter” etc. should be discouraged as they detract from the ribbons that identify WHSG and Local Committee personnel. Example ribbon below:



### WHSG Executive Committee (all blue ribbon)

- WHSG Chair
- WHSG Conference Chair
- WHSG Secretary
- WHSG Treasurer
- WHSG Past Chair
- WHSG Regional Rep.
- WHSG Student Rep.
- WHSG Staff

### WHSG Local Committee (all in red ribbon)

- Chair
- Member

- Other?

WHSG Sponsor (all green ribbon)

## Meals

The registration packet should contain a list of restaurants in the area, their addresses and phone numbers, and a map showing the distance from the eateries to the conference site. A useful service to conference attendees is for the Local Committee to collect menus of restaurants close to the conference site and have them available in the registration or coffee break area.

If there are not enough restaurants in walking distance that can accommodate 150 to 200 people for lunch and dinner meals, the Local Committee should consider catering those meals for an additional fee. The hotel restaurant is typically unable to serve all conference participants at lunch.

## SCIENTIFIC PROGRAM

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The Scientific Subcommittee is responsible for all aspects of the scientific program, including soliciting presentations for the conference, determining if they are acceptable, and organizing the scientific sessions. The subcommittee is led by a volunteer Chair, who should be approved by the Local Committee as soon as possible after the proposal to host the conference is accepted. The subcommittee chair should invite others to participate on the Scientific Subcommittee based on input from the Executive Committee and the Local Committee. The size of the Subcommittee can vary; fewer individuals are easier to organize, while a larger group means there are fewer abstracts to review.

The Subcommittee chair or one of the members of the subcommittee should prepare requests for Symposia and Abstract submissions following the conference organizing schedule (see example request in Appendix G). An on-line submission process should be developed to allow easy submission of abstracts in English or Spanish. This process may or may not be coordinated through the Local Committee. People unable to provide a high-quality abstract in both languages should be charged a fee for translation services. The Scientific Subcommittee should ensure that at least two people review each abstract, preferably in their specialty areas. Most abstracts that are submitted are usually determined to be acceptable, especially since one goal of WHSG is to encourage students and early career professionals to participate. In some cases, the Scientific Subcommittee may request revisions to abstracts to meet generally accepted guidelines, and a few may be rejected. Several months before the conference, the Scientific Subcommittee Chair will email presenters a notification of acceptance of their presentation, which includes when and where their presentation is scheduled and suggestions for producing and presenting a high quality oral or poster presentation. Because most participants will need to organize travel and lodging, acceptance letters should be sent as early as possible.

The Scientific Subcommittee's main organizational task is to arrange the accepted abstracts that are not part of organized symposia into sessions on general topics of interest. It helps greatly if the call for abstracts includes asking presenters to identify the most relevant session topic (e.g. migration ecology, foraging dynamics, etc.). While organizing sessions, the Scientific Subcommittee should also arrange them to fit the conference schedule, in cooperation with the Local Committee, giving special attention to avoiding conflicts wherever possible. For example, presenters may have multiple talks, and prefer they not be in concurrent sessions. If possible, avoiding concurrent sessions likely to be of interest to the same people is preferable, although this can be difficult. Once the schedule is

finalized, the Scientific Subcommittee Chair forwards the program schedule and the abstracts to the Local Committee for inclusion in the Program Book a minimum of one month before the conference.

The Scientific Subcommittee should provide the Local Committee with a complete list of presenters names and presentation titles (and whether it is a poster or oral presentation). This information will be used by the Local Committee to prepare certificates denoting that the person gave a presentation. The list is also very helpful for cross checking with registration lists; presenters who have had an abstract accepted but did not register by the deadline should be contacted so they can register. After the conference, this list of presenters should be compared against those that actually registered (which frequently depends on a person getting a travel award) to ensure certificates only go to people that have attended and presented talks.

## Virtual Conference

The WHSG has not organized a virtual component to their in-person conferences. However, due to COVID-19 pandemic many professional societies have hosted virtual conferences. This section should be revised by future organizers who organize the virtual conference for the first time. Indeed, it is plausible that a mixed in-face and virtual conference be held in the future.

A few places to look for information:

[International Wader Study Group Conference](#)

[The Waterbird Society](#)

[Neotropical Ornithology Congress](#)

[Asociacion Colombiana de Ornitologia](#) (Colombian Ornithology Society)

[British Ornithologists' Union](#)

## Oral Presentations

In most conferences, two or three concurrent paper sessions are needed to accommodate the number of papers submitted. It is important for the Local Committee to schedule rooms for concurrent sessions geographically close enough together so that attendees can easily change sessions in a brief time. Placing papers of a similar theme together in the same session will help to minimize movement between presentation rooms. Also, placing widely divergent topics concurrently should be encouraged for the sake of attendees' ease in selecting which sessions to attend. A list of papers to be presented and the times of presentation should be posted prominently outside the conference room for each session.

General session oral papers are typically 20 minutes long, including three minutes at the end for questions. Plenary speakers, typically held first thing in the morning, are allotted 45-50 minutes, with an additional 10 minutes for questions. Symposia and workshop speakers are allotted 20 minutes, the same amount of time general session speakers have for their presentations. Ten-minute "speed talks" are sometimes included as oral presentations; these run concurrent with the 20-minute presentations. The Local Committee should feel free to experiment with other arrangements as they wish.

The Local Committee will provide a computer where presenters will pre-load their presentations into folders identified by room, date, and session. The Local Committee also will provide large volume high quality USB flash drives so that presentation folders can be moved from the pre-loading computer to the presentation room computers efficiently and reliably. Alternatively, presenters can pre-load talks during breaks in the session room where they will be presenting. Files should be loaded at least one session prior to the actual presentation time.

Session moderators are chosen by the Scientific Subcommittee Chair from a list of individuals who have indicated their willingness to moderate a session during abstract submission. Moderators must be experienced individuals who can hold presenters to their allotted time slots; this is especially important when concurrent sessions are underway. Where possible, some early career professionals and students should be added as moderators so they may gain experience and to promote inclusiveness by WHSG.

The Scientific Subcommittee Chair should provide written instructions to moderators before the conference convenes. It is also advisable that the Scientific Subcommittee Chair meet with all moderators at the beginning of the conference to review the schedule and procedures and answer questions. Moreover, moderators should try to meet the speakers in his/her session to learn how to pronounce unfamiliar speaker names and to be informed of special needs. Each meeting room must have a podium and laser pointer for the speakers. Room lighting should be low enough to see the slides but still provide enough light to read or take notes. Lights must be easily controlled so speaker needs can be met. In addition, the hotel should ensure doors to meeting rooms can open and shut quietly to avoid disturbing speakers.

The Local Committee may also accommodate one or more international speakers who wish to make oral presentations via a video conferencing platform. Such requests should be accommodated only if the technological challenges can be worked out. These include the need for good, high-speed internet access at the presenter's site and at the conference venue. Moreover, it is preferable that papers with off-site presenters be grouped in a separate session or sessions to avoid technological glitches and their impact on the flow of the conference. Details for any such virtual oral presentations must be worked out well in advance of the conference, in coordination with the Scientific Subcommittee Chair and Conference Committee Chair.

The Local Committee must determine the audiovisual requirements, not only for the general oral presentation sessions but also for workshops, symposia, business meetings, special events and banquet. It is advisable to have a digital projector, microphone, laser pointer, and laptop computer in every meeting room. Having at least one backup projector, laser pointer and laptop on hand is essential.

Projection screens must be large enough to allow attendees to see the slides easily from the back of the room. Try to avoid conference rooms that have large pillars that interfere with people viewing the screen. The screen needs to be positioned high enough for easy viewing over the heads of people seated in front.

The Local Committee will provide well-trained, two-person audiovisual crews for each session, one person to operate the projectors and the other to turn lights off and on and monitor the door so that it remains closed when not in use and does not result in undue noise when opened and closed. This is often a good place to have student volunteers because they are also often technically competent.

Each lecture room should be set up so the entrance doors are at the back of the room, and not at the front, to prevent unnecessary disturbance as people enter and leave the room during presentations. The hotel staff should perform maintenance on doors to oil hinges and locks for quiet entry and exit. To the extent possible, aisles and chairs should be arranged to accommodate large numbers of participants entering and leaving to change sessions.

Oral and poster presentations can be done in Spanish or English, although instructions encouraging people to use a combination of both (e.g., slides in Spanish but speak in English, or vice-versa) should be posted on the website (under Scientific symposium and abstract submissions).

## Poster Presentations

Posters are an effective alternative to oral presentations at scientific conferences. The poster presentation room must be large enough to avoid crowding and close enough to the main sessions for attendees to visit conveniently. Ideally, the posters should be available for viewing for 1-2 days, including the entire day on which the poster session is held. The formal poster session is held in the evening so that it does not conflict with the oral presentation sessions. The poster session is usually combined with a social event by serving appetizers and having a cash bar in the poster presentation room, and this is important to ensure a good turnout for the session.

The size of the poster display boards is standardized across WHSG conferences at 3' x 4' panels (91 x 122 cm) to be displayed vertically, or horizontally given sufficient room, at the discretion of each presenter. The Local Committee should plan to provide poster boards on-site and provide all the items necessary to mount the displays, (tacks, push pins, staple guns, tape, scissors, Velcro). Poster presenters are required to stand near their poster during the evening poster session scheduled by the Local Committee. Instructions for poster presenters should also be on the website (under Scientific symposium and abstract submissions).

## Plenary Speakers

WHSG conferences typically feature one invited keynote speaker per morning of talks (for a total of four); these are usually people whose work is well known by the majority of the shorebird research community. A plenary address is a fantastic way to start a day of scientific papers. Most plenary addresses are 45-50 minutes in length. These events require a room in the conference center that can accommodate the full number of conference registrants.

The Local Committee is responsible for extending invitations and making arrangements for plenary speakers. Decisions on the plenary speaker selections are to be made in consultation with the WHSG Executive Committee. The costs for Plenary speakers to participate in the conference should be part of the budget of the Local Committee; this includes travel to and from the conference, lodging, meals, and registration fees. Plenary speakers should be encouraged to have some or all of their expenses paid by their employer, rather than by the Local Committee; this of course helps keep conference expenses down. Also, at least one plenary speaker should be from where the conference will be held so as to highlight local shorebirds and their issues. Selecting a local person will also reduce travel costs and other expenses.

## Symposia

Symposia focusing on special topics are welcome additions to the scientific program at WHSG conferences. These are half or full day sessions with formal oral presentations by invited presenters. Symposia may be initiated and organized by the Local Committee, by the Scientific Subcommittee Chair, or by individuals not associated with the organization of the conference. Invitations to hold a symposium are included in conference announcements nine months to a year before the conference is held. All symposia must be approved by the Scientific Subcommittee.

## Workshops and Side-meetings

Workshops are welcomed at WHSG conferences and are effective means of disseminating information in an informal setting. Workshops may be initiated by the Local Committee, the Scientific Subcommittee Chair, the WHSG Executive Committee or by outside parties. Workshops are typically scheduled prior to or after the conference; workshop leaders decide on who can attend their workshops (i.e., they can be open or closed). The Local Committee will work with the workshop/side-meeting leaders to provide adequate rooms and logistical needs, as well as to coordinate online registration. An additional fee may be associated with attending workshops/side-meetings to pay for room rental, coffee and snacks.



## Travel Award Program

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The Travel Award Subcommittee provides funds to people who would like to attend the WHSG conference but cannot afford to do so. Funding is limited to students from throughout the Western Hemisphere, Latin American professionals, and early career North American professionals (within 3 years of graduating with Master's or PhD of the start of the conference). The travel awards are limited to people working on shorebirds in the Western Hemisphere, although people residing in countries outside the Western Hemisphere but working on shorebirds in the Western Hemisphere are eligible to apply. Applicants are also expected to submit an abstract for an oral or poster presentation and deliver their presentation.

The Travel Award Subcommittee is led by a volunteer chair who is approved by the Local Committee as soon as possible after the proposal to host the conference is accepted. The chair should invite others to participate on the subcommittee based on input from the WHSG Executive Committee and the Local Committee, although the subcommittee should be limited to 5 people (which includes the chair) to make selection of award winners manageable. Ideally, the 5 people should be from different parts of the Western Hemisphere so it is easier to evaluate the merits of all applicants.

The Travel Award Subcommittee Chair works with the Local Committee to advertise the availability and timeline for submitting travel award applications (see example application, Appendix H). S/he also communicates the award results to all applicants. The subcommittee chair also works with regional WHSG Executive Committee members to encourage their constituents to save funds for traveling to this conference (to reduce travel award need). Further, the chair works with the Finance Subcommittee Chair to determine funds available for distribution.

The subcommittee members rank travel award applicants based on 1) their contribution to the conference (e.g., number of presentations, whether they are organizing symposium or chairing symposia or workshops); 2) their career stage (e.g., undergraduate, graduate, early-career or late career professional); 3) financial need (e.g., unrealistic high requests are questioned), 4) their country of origin (with an effort to ensure people from all countries in the Western Hemisphere are represented); and other considerations (e.g., have they received awards for past conferences). It is important to collect these data from applicants to allow these factors to be considered when deciding awards. An effort should be made to select winners at least two months prior to the conference to allow reasonably priced tickets to be purchased.

Travel awards typically include money to cover transportation (bus, air fare) to and from the conference location, inexpensive housing and minimal food allowance (stipend) for each day of the conference (workshop days occurring before or after the conference are not generally covered), banquet fee (if not covered in price of registration), and registration (student or professional rate).

Typically, a travel agent is hired by the Local Committee to help purchase tickets. Award winners can provide input to ticket dates and routes, but costs of tickets should be kept at a minimum to allow the most people to get awards. The travel agent may be paid a small fee per travel award winner that should come from the travel award overall fund. Funds for housing and food are typically distributed in cash to award winners when they are checking in during the registration at the conference. It is not advised to send funds for housing or food to award winners in case their attendance does not occur.

It's important for the committee to establish some basic budget rules for purchasing tickets. Tickets should not be purchased if they are last minute and very expensive. If travel award winners are not replying to requests for information needed in a timely fashion for ticket purchase and approval, the award winner should be notified that they will lose the opportunity to have a travel award.

The Travel Awards Chair is primarily responsible for maximizing the number of awards allotted each conference. To do this, they will 1) communicate directly with advisors of students to ensure most deserving students receive awards and that the universities and advisors help pay for travel; 2) provide a reasonable rate for housing and food to award winners based on the idea that award winners can stay in hostels or other lower-priced establishments (based on consultation with the Local Committee); and 3) work with other funding providers (e.g., NGOs, U.S. Federal Agencies) to help pay for travel of some applicants.

## Lifetime Achievement Awards and Pablo Canevari Award

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Two WHSG Lifetime Achievement Awards (Lew Oring and Allan Baker) and the Pablo Canevari Award are given at each biennial conference. These awards recognize people who have made substantial contributions to the conservation and research of shorebirds in the Western Hemisphere. Award descriptions, guidelines for nominations and past winners of all three awards can be found [here](#). More specific information for the selection of the Pablo Canevari Award is made by the WHSRN Executive Office. <https://whsrn.org/about-whsrn/pablo-canevari/>

The Lifetime Achievement Award Subcommittee selects the winner of the Lewis Oring and Allan Baker awards prior to each Conference. The Lifetime Achievement Award subcommittee is led by a volunteer Chair who is approved by the Local Committee as soon as possible after the proposal to host the conference is accepted. The Chair should invite others to participate on the Subcommittee based on input from the Executive Committee and the Local Committee, although the subcommittee should be limited to 5 people (which includes the chair) to make selection of award winners manageable. Ideally, the 5 people should be from different parts of the Western Hemisphere so it is easier to evaluate the merits of all applicants.

The Subcommittee Chair works with the Local Committee to advertise the availability and timeline for submitting Lifetime Achievement award applications (See Appendix I). S/he should actively solicit submissions when needed, and also communicates the award results to all applicants (unless a surprise announcement at the conference is desired).

The Subcommittee members rank Lifetime Achievement Award applicants differently depending on the award. The Lewis Oring award ranking is based on 1) their research accomplishments (e.g., number of publications, especially in high-ranking journals, oral and poster presentations), 2) his/her/their leadership in avian conservation, 3) evidence that the candidate's research has advanced the scientific understanding of shorebirds and of science overall, 4) their mentorship of students and the role those students have gone on to play, and 5) their career stage (e.g., reserved for late career professional). The Allan Baker award ranking is based on 1) their conservation accomplishments, 2) his/her/their leadership in avian conservation, 3) conservation implications of their work, 4) ) their mentorship of students and the role those students have gone on to play, and 5) their career stage (e.g., reserved for late career professionals).

It is important to collect these data from applicants to allow these factors to be considered when deciding awards. It is important to ensure winners are worthy of such a distinguished award, and it is not required that an award be given at each conference. Lifetime Achievement awards include a \$1000 stipend whereas the Pablo Canevari award has a \$2000 stipend. An effort should be made to select winners at least two months prior to the conference to allow winners to purchase reasonably priced tickets. To date, beautiful award plates have also been provided via a small commission to Rocio Landivar for producing the plates.

## Attendance Certificates

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It is customary for some students and professionals to require documentation of attendance or acceptance of an abstract after attending a conference for their resume. To accommodate this need, presentation and attendance certificates will be emailed to attendees after the conference has concluded. The Local Committee with assistance from the Scientific Subcommittee (who has the final papers list) should prepare and send presentation certificates to each oral and poster presenter at the conference. The Local Committee, with assistance from the WHSG Student Representative, should also send an attendance certificate to every registered person (who picked up their registration packet). The latter items may be placed on a Google Drive to make things easier. Please see Appendix J for draft certificates.

## WHSG BUSINESS MEETINGS

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### WHSG Executive Committee Meeting

The WHSG Executive Committee typically meets at each conference to discuss relevant business behind closed doors. Topics of discussion might include reviewing and ranking applicants that have applied to host the next conference, the financial status of the WHSG, acceptance of nominees for a future election of WHSG Executive Committee, initiatives the WHSG Executive Committee may wish to undertake between conferences, and other issues deemed pertinent to the WHSG Executive Committee.

*When:* The first or second day of the conference, typically 2 hour time slot.

*Attendance:* Attendees comprised of WHSG Executive Committee members

*Seating requirements:* 10 chairs arranged around a meeting table with 5-10 chairs lined up along a wall.

*Audiovisual requirements:* A digital projector. A screen for the projector should be provided only if there is not sufficient wall space for projected images. Otherwise, the screen will only add to clutter in the room. There should be sufficient extension cords or power-strips to permit 10 laptop computers to be used at the meeting table. Internet connectivity should be provided for the meeting. The board often uses teleconference participation from non-attending board members through Skype or other internet service. Internet signal and bandwidth should be strong enough for teleconferencing.

*Refreshments and food:* Ice water, coffee, a small selection of canned sodas, including diet sodas with and without caffeine. In addition, a small selection of fruits and pastries should be made available.

### PUBLIC BUSINESS MEETING

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WHSG holds a follow-up business meeting that is open to all during each conference to share information with members about the next conference, finances, election of WHSG Executive Committee members, and activities of the organization. The business meeting must not be scheduled concurrently with any other activity. The WHSG Chair is responsible for planning and conducting the business meeting. The Local Committee Chair will also be invited to discuss the present conference, and the next Local Committee Chair will be invited to share insights on the next conference venue.

In the days leading up to the business meeting, attendees should be strongly encouraged to attend this meeting. On the day of the business meeting, session moderators should remind attendees when and where the business meeting will take place.

*When:* Towards end of Conference (perhaps the last full day of paper sessions), typically one hour in the late afternoon

*Attendance:* Usually 125 – 150.

*Seating requirements:* “Theater” seating (e.g., where plenary talks are held), with a podium at the front of the room.

Equipment requirements: translator and necessary headphones, laptop, microphone, projection screen, and digital projector.

*Refreshments and food:* None.

*Cost:* None.

## SOCIAL EVENTS

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### WHSG Alcohol Policy

Alcoholic beverages, usually limited to beer and wine, are made available whenever they are deemed socially acceptable by the Local Committee and host community. Moreover, the minimum age to be served in licensed premises will follow local (country, state) regulations. Individuals are to purchase alcohol at a cash bar staffed by licensed servers. At some conferences, self-serve alcohol has been provided to attendees free of charge by a conference sponsor. In the latter case, representatives of the Local Committee should purchase an insurance policy that includes host liquor liability.

### Opening Reception

This opening reception kicks off the conference and is generally a time for people to meet old colleagues and new colleagues. It is designed strictly for socializing and does not include entertainment.

*When:* Evening before the first full day of paper sessions, typically 6:00 – 9:00 PM

*Attendance:* Minimum of 200.

*Refreshments and food:* Hors d’oeuvres, substantial enough to provide a light dinner, non-alcoholic beverages, and a bar where alcohol can be purchased by individuals.

*Cost:* Included in registration fees or provided by a Sponsor.

### Poster Session Reception

This reception is held in conjunction with the evening poster session

*When:* Evening of the first full day of paper sessions, typically 6:00 – 9:00 PM.

*Attendance:* Minimum of 150.

*Refreshments and food:* Hors d’oeuvres, substantial enough to provide a light dinner, non-alcoholic beverages, and a bar where alcohol can be purchased by individuals.

*Cost:* Included in registration fees or provided by a Sponsor.

## Coffee Breaks

Coffee breaks are a very important part of the networking feature of WHSG conferences. The conference schedule should include two 20-30 minute breaks, one mid-morning and the other mid-afternoon. The Local Committee should provide coffee, tea, juice, water, and soft drinks as well as pastries or cookies, and/or fruit for each break. Keeping coffee breaks 'green' is encouraged. Examples of this include requesting the venue not provide bottled water or disposable plates and cutlery. It is important to provide good quality and a sufficient quantity of food at coffee breaks.

## Silent Auction

The sale of materials donated by the WHSG Conference participants has been used to raise travel award funds for future conference participants for many years. Holding an auction and raffle at the banquet will usually be profitable if an adequate quantity of desirable items and/or services can be obtained by donation.

The Silent Auction subcommittee working with the Local Committee is responsible for advertising, holding the auction, and working with the Silent Auction subcommittee to ensure cocktails/snacks are present and there is a mechanism to receive credit card purchases. The Silent Auction subcommittee is led by the WHSG student chair or another substitute. The Subcommittee Chair should invite others to participate who they know are enthusiastic and excited to help.

Getting the word out: It is helpful to send out an initial notice 6 months in advance of the Conference, and a final reminder notice 7-10 days prior to the start of the Conference to ask people to bring donations for the Silent Auction (prior to people beginning their travel to the meeting). These announcements should go to all registered people for the conference, as well as the WHSG listserv/Facebook page. In addition, the WHSG Executive Committee members should be asked to encourage their colleagues to bring materials for auction. Crafting a specific email to encourage appropriate donations is important so that people don't have to haul their stuff back. An announcement of this should also be made on the Conference website.

Types of items to bring: Some approaches that people take are to purchase gifts with their own money, make something themselves, donate something of their own, or solicit local businesses for donations. It is helpful to suggest that people bring things that are unique and that travel well (e.g. small enough to stuff into an already full bag). Items can be pottery, art and crafts, gift items, t-shirts and hats from various institutions, books, field guides, sets of gift cards, artisan foods and beverages, scientific equipment, and binoculars or scopes. Hopefully, people will bring used equipment in good condition. Things that are unique, relatively small (will fit in a suitcase) and have a shorebird on them are usually hot items. Field guides also sell well too. Distinguished shorebird biologists might also raffle off items that others at the conference might deem valuable. Similarly, sponsors might contribute items that can be raffled off.

Other things to consider: Having a place for people to leave their auction items at any time (such as the registration desk) is important too. People want to unload their donations (after carrying them for perhaps thousands of miles) and having these donations not tied to a specific person (who is organizing the Silent Auction) is helpful. The registration desk is a logical place to leave donations since it will be staffed with someone for designated periods of time that are listed on the conference materials.

Drop off and registering items: Once a drop off location and/or time is established, it is helpful to tag each donation with a unique number tag that gets taped to the donation and form (see Appendix K, for example form). The donor should fill out the form that has the following information: Item number, item description, donor name and/or institution, suggested minimal bid, lines for people to sign up for their bids (name and bid\$). People struggle with the minimal bid suggestion. It should be

~10 - 25% below the actual true value of the item so that people think they are getting a deal (and maybe they will!). If set up this way, then it is a simple task to lay out the items just prior to the Silent Auction event. Make sure that there is a way to attach the item number (scotch tape) to the item and not the actual bidding form, else the items will get messed up in the pile of donations. Instructions for people accepting the silent auction donations is a good idea.

How to sell donations and make the WHSG money: During the Silent Auction event, a microphone system should be set up so that the Subcommittee Chair can announce when donations come on sale and when they close to bidding. Auctions can be silent or with an auctioneer. A good auctioneer can usually coax more money out of the audience than will a silent auction. It is especially helpful to have a few gregarious people walking around encouraging people to participate and out bidding their colleagues. A little good-natured heckling goes a long way with this crowd. This seems especially effective after people have had a few drinks (so the availability of cocktails and snacks is essential).

Payment: If this will be a cash silent auction only, it is important to make sure people know well in advance that they need to bring cash. A better approach is having the ability to accept a check or credit card, as people will typically spend more money if this can be arranged. The Silent Auction Subcommittee chair should work out the financial arrangements in advance (and announced to conference participants) with the Local Committee so that by the end of the night everything has been completed (all items have been paid for and taken home). If there is a really specialty item (e.g. scope, telemetry tags) donated, the Subcommittee chair should try to sell the item in a live auction. These can be very fun and potentially increase the amount of money raised.

The amount of funding raised from the Silent Auction has grown during each conference, but typically is between \$2000 to \$4000 USD.

## Banquet and Award Ceremony

The Banquet and Award Ceremony typically closes the conference (aside from side meetings/workshops that may take place the next day). It is here that people have one last time to socialize, where the Local Committee can recognize people that have made substantial contributions to holding the conference, and the various award committees can recognize leaders in our shorebird community. The Local Committee will need to work with the conference center, hotel, or caterer well in advance to set the menu and establish details such as when a final count of attendees for the banquet is needed (whether people plan on attending the banquet and if they will have any guests accompanying them should appear on the registration form). The Local Committee will need to coordinate with the WHSG Chair and the WHSG Awards Committee Chair on the details and scheduling of the awards and any other business to be conducted at the banquet. The Local Committee should nominate one person to act as the “Master of Ceremonies” for the evening.

Banquet formats vary according to conference location and the desires and imagination of the Local Committee. To encourage attendance, especially by students, the Local Committee is encouraged to have the banquet costs incorporated into the overall registration fee (not a separate line item cost) or keep the cost of the banquet to a minimum. Having a buffet dinner is an effective way to keep banquet ticket costs reasonable. Once the awards are completed, it is customary to have some form of local entertainment to close the night off. Cocktails are typically available for people to purchase. Banquet entertainment should be light and brief, perhaps in the background, because the agenda can be quite full. The banquet and award ceremony is the final event of the conference and important for attendees to finish networking.

*When:* Evening of the third full day of paper sessions, typically 6:00 – 7:00 PM is social hour, 7:00 – 8:00 PM is dinner, 8:00 – 9:00 is awards, and 9:00 to Midnight is entertainment.

*Attendance:* Usually 150-175.

*Refreshments and food:* Plated dinners or buffet style, non-alcoholic beverages, and a cash bar.

*Cost:* Try to include in registration fees if possible, if this is too costly, then try to minimize cost to maximize participation by low income people (no more than \$25/person). Additional banquet fees are typically not covered by travel awards.

A typical banquet agenda may include: speeches or presentations by the Local Committee Chair, WHSG Conference Committee Chair, Lifetime Achievement Subcommittee Chair, Pablo Canevari Award Chair, Silent Auction Subcommittee Chair, and other special event or presentation (photographs, videos, artistic events). This is really the time for the Local Committee to do what they wish – they have earned it by this point.

## FIELD TRIPS

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Field trips are important components of WHSG conferences. While shorebirds are typically the focus of field trips, other local species, habitats, and cultural locations may be of interest to conference attendees. Consider that there may be spouses and children present that prefer not to go birding, but would love to see the sights of the local town. Field trips should be well described on the website. Field trip registrants need to know whether walking is required, and, if so, the degree of difficulty involved; what special clothing might be needed (e.g., hiking boots; rain gear), and whether lunch and drinks will be provided. Field trips should occur during the conference, and are typically after the second day of the scientific program. Longer field trips may also be scheduled before or after the main conference days.

Field trip costs should be either paid directly by the participant to the field trip vendor or be part of the registration fee page. We recommend that the Local Committee charge a percentage of the profits for connecting people to the field trip vendors to recover costs.

## TRANSPORTATION

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An international airport should be located relatively close to the conference location, as most conference participants will travel to the conference by airplane. The conference website, through information provided by the Local Committee, should provide information on the nearest airport and all airlines that serve it. Information on ground transportation (shuttles and rental cars) between the airport and the conference should also be provided. If bus and passenger railroad stations are reasonably close to the conference venue, their locations should also be provided.

## VENDORS

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A few local organizers have permitted vendors an opportunity to offer products, equipment, books, photos, and wildlife art of interest to shorebird biologists. This is organized by the Local Committee. Vendor exhibit space must be in a room that is secure when the conference is not in session. Ideally, the vendor room will be very convenient to the meeting rooms so that conference participants can browse the exhibits between sessions and at coffee breaks. Rental of table space for vendors is a source of income for the conference and should be negotiated carefully. Higher rental rates should be charged for commercial than for non-profit vendors. Vendor charges have ranged from \$50 per booth or table for non-commercial to \$300 per booth or table for commercial vendors at recent conferences. In addition, vendors or other sponsors should be given the option to advertise in the



Program Book with rates for quarter-, half-, or full-page spreads. Vendor fliers may be included in the registration packets at no charge.

If vendors plan to participate in conference activities, they should be required to pay partial or full registration fees, depending on the extent of their participation.

## EARLY CAREER AND MENTOR SOCIAL

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At each conference, we aim to promote the participation of students and early career researchers by hosting a social to help foster interaction among generations of researchers. The Local Committee should select a Mentor facilitator (lead researcher/conservationists) to organize the event. Communications to recruit both seasoned professionals and early career professional and students should be delivered via social media channels, conference and WHSG website and in e-mails. The Local Committee can reserve the space and time for people to socialize (perhaps at end of field trip day when nothing else is scheduled) and put into the Conference schedule.

## CODE OF CONDUCT

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### Code of Conduct for WHSG Conferences

The Western Hemisphere Shorebird Group hosts a biennial conference to exchange and disseminate scientific information on shorebirds, including ecology, behavior, evolution, conservation, and outreach. Because effective exchange of ideas can only be accomplished in a friendly and open environment, it is fundamental to ensure that conference attendees treat each other with courtesy and respect in all interactions, including face-to-face, written, or electronic. For this reason, WHSG places special care and emphasis on provisioning and ensuring a safe, hospitable and productive environment for everyone attending its biennial conference, regardless of ethnicity, nationality, religion, disability, physical appearance, gender, age, or sexual orientation. We take this aspect of our mission very seriously and expect all conference attendees to behave courteously, respectfully, and professionally to each other, to WHSG representatives, to conference volunteers, exhibitors and local conference venue staff.

WHSG expects conference attendees to be able to engage in open discussions free of discrimination, harassment, and retaliation. We strongly believe that a community where people feel uncomfortable, threatened, or under discriminatory scrutiny is neither healthy nor productive. Accordingly, WHSG strictly prohibits any degree of intimidating, threatening, or harassing conduct during our conferences. This policy applies to speakers, staff, volunteers, exhibitors, and attendees. Conference participants violating these rules may be sanctioned, expelled from the conference, or expelled from WHSG at the discretion of the WHSG Executive Committee.

### Reporting an Incident

Any attendee who believes that she/he/they has/have been subjected to harassment, notices that someone else is being harassed, or has any other concerns about an individual's behavior should contact any member of the WHSG Executive Committee or Local Committee. She/he/they will be not required or expected to discuss the concern with the alleged offender. All complaints will be treated extremely seriously and investigated during the conference itself, unless reported after its completion. Reports will be filed. Confidentiality will be honored to the extent permitted as long as the rights of others are not compromised. Maximum sensitivity to the discomfort of the harassed participant will be favored by assigning the lead of the complaint-management, whenever feasible, to an Executive Committee member as capable as possible to comprehend the sensitivity of the issue



at stake, (e.g. cases of sexual harassment will be led by an Executive Committee member of the same gender; cases of discrimination against a minority by a minority, Executive Committee member with experience working abroad etc.).

## Disciplinary Action

Individuals engaging in behavior prohibited by this policy as well as those making false allegations of harassment will be subject to disciplinary action. WHSG leadership may take any action they deem appropriate, ranging from a verbal warning to ejection from the conference or activity in question without refund of registration fees, to expulsion from the group, and the reporting of their behavior to their employer. Repeat offenders may be subject to further disciplinary action, such as being banned from participating in future conferences. Disciplinary action will apply to all offenders participating in the conference, including WHSG Executive Committee members and Local Committee members.

## Retaliation Is Prohibited

WHSG will not tolerate any form of retaliation or attempt at dissuasion against individuals who file a complaint or assist in the investigation, either by the original offender, or by any individual on his/her behalf, or by the Executive Committee member who receives the initial complaint. Retaliation is a serious violation of this policy and, like harassment or discrimination itself, will be subject to disciplinary action.

## Questions and Appeal

Any questions regarding this policy should be directed to the WHSG Executive Committee Chair/regional member, or the Local Committee Chair/member, which will re-direct it to their larger group. In the event that an individual involved in any reported incident is dissatisfied with the disciplinary action, she/he/they may appeal to the WHSG Executive Committee, which will privately discuss the issue and vote for a decision.

## Investigation Procedure

1. Whenever possible, the situation will be dealt with informally and in real time by approaching the offender and communicating a warning to the offender to immediately cease the behavior, without revealing the identity of the complainant and after approval about this procedure by the complainant.
2. Should this not be enough, and previous approval by the complainant, the WHSG Executive Committee will name one or two impartial investigators, considered to be sensitive to the delicacy of the task and capable to assess it professionally.
3. Any named investigator who believes they have a conflict of interest should not serve as an investigator.
4. The investigator(s) will request an official written letter of complaint from the complainant (documenting the nature of the harassment and/or discrimination, with detailed information including times, places, nature of incident(s), and comments made). Supporting documentation (emails, notes, posts, etc.) and statements from witnesses should be submitted with the letter.
5. In most cases, the complainant will be interviewed first and the written complaint reviewed. If the complainant has not already filed a formal complaint, he or she should be asked to do so.
6. The details of the complaint should be explained to the alleged offender by the investigator.
7. The alleged offender should be given a reasonable chance to respond to the evidence of the complainant and to bring his or her own evidence.

8. If the facts are in dispute, further investigatory steps may include interviewing those named as witnesses.
9. If, for any reason, the investigator(s) is in doubt about whether or how to continue, he or she will seek appropriate counsel (from the WHSG Executive Committee, legal—if approved by the WHSG Executive Committee, etc).
10. When the investigation is complete, the investigator(s) will report the findings to the WHSG Executive Committee. The Executive Committee will determine how to proceed and if a report should be submitted to the offender’s employer.

## POST CONFERENCE RESPONSIBILITIES

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### Conference Summary Report

It is incumbent on the Local Committee, with assistance from the WHSG Staff member, to publish a report that summarizes what happened at the conference in the journal *Wader Study*. Example summaries can be found at the WHSG website [here](#). The Local Committee should budget for page charge expenses (typically \$700 to \$1000 USD) and solicit funds from sponsors to cover this expense. Sometimes single sources can be found to cover these costs. For example, the US Fish and Wildlife Service covered page charge costs for the past two conference reports.

### Conference Report

A complete Conference Report must be submitted to the WHSG Chair and WHSG Conference Chair (who will distribute to other WHSG Executive Committee members) within one month of the conference conclusion and should contain information shown below. The conference report is an accounting of what the Local Committee did to hold the conference, but also provides tips for future organizers who frequently read past reports to learn how to host conferences. With that in mind, including specific information can be helpful for comparing prices and ordering merchandise. For example, listing vendors and price per unit for merchandise or catering is helpful.

Reports are expected to include:

- Organizers (list names)
  - Local Committee Chair(s) and members
  - Scientific Subcommittee Chair and members
  - Finance Subcommittee Chair and members
  - Travel Award Subcommittee Chair and members
  - Lifetime Achievement Subcommittee Chair and members
  - Silent Auction Subcommittee Chair and members
  - Conference Chair
- Location and Venue
- Conference dates, including general conference and side meetings / workshops
- Sponsors and contribution
- Attendance/Registration
  - Number of attendees broken down by country, status (Professional, Student), and gender
  - Registration fee schedule by early, mid and late registration
  - Registration numbers by early, mid and late registration
  - Conference Planning Service (if utilized)

- Publicity and Outreach conducted
- Program booklet to include presentations: Special Presentations, Symposia, General Sessions (pdf should be attached to report)
  - Deadline for submission of papers
  - Number of oral papers and poster presentations presented
- Plenary speakers – list names
- Side meetings / workshops held
- Lew Oring and Allan Baker Lifetime Achievement Award winners
- Pablo Canevari Award winner
- Travel Awards – list number of applicants and number of awards provided (itemized accounting of this should be in the budget report described below)
- Silent Auction – describe rate of participation (items donated) and funds acquired (this should appear in Budget report below)
- Social Events held: e.g., Icebreaker Reception, Poster Session and Reception, Friday Evening Dinner Reception, Banquet and Award Ceremony, other
- Website address
- Sales (list what was provided and how many were sold and at what price)
  - T-shirts, tote bags, mugs, etc.
  - Silent Auction (optional)
  - Vendors
- Field Trips – describe locations visited and attendance to each
- Suggestions for Future Conferences
- Report author names (include contact information)

## Budget Report

A complete Conference Budget Report must be submitted to the WHSG Chair and WHSG Conference Chair (who will distribute to other WHSG Executive Committee members) within two months of the conference conclusion and should contain information shown below.

- Financial Report – final accounting
  - Itemized Expenses (examples below)
    - Conference center
    - Snacks/coffee
    - Website fees
    - Travel awards program
    - Internet, other office fees
  - Itemized Income (examples below)
    - Registration fees
    - Sponsorships
    - vendors
  - Profit/loss conclusion
  - List of In-kind and donated services
  - Travel Awards – sponsors and awards

## ACKNOWLEDGEMENTS

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The Raptor Research Foundation (Libby Mojica, Dan Varland) kindly allowed us to copy the general format and content of their conference-organizing guide. We are forever indebted to the foundation for sharing so graciously. The creation and organization of the Western Hemisphere Shorebird Group Conference was orchestrated by the following past organizers: US. Fish and Wildlife Service (USA), Simon Fraser University (Canada), Asociación Calidris (Colombia), Virginia Tech. (USA), CORBIDI (Peru), Panama Audubon Society (Panama). Cover photo: CORBIDI staff. This manual benefitted from feedback and review from the following individuals: Rob Clay (Manomet), and Yenifer Diaz (Panama Audubon Society). This is a work in progress and is intended to be a living document.

## Appendix A. Application to Host the Biennial Conference of the Western Hemisphere Shorebird Group

Reference materials helpful in completing this application include the “Guide to Planning the Western Hemisphere Shorebird Group Biennial Conference” and summary reports from previous WHSG conferences. This information is available online at the WHSG website: <https://westernshorebirdgroup.org/meetings/>

*Please fill in the application using italics.*

### Conference Basics

Local Committee Chair Name \_\_\_\_\_ e-mail \_\_\_\_\_

Local Committee Co-Chair Name \_\_\_\_\_ e-mail \_\_\_\_\_

Local Committee Member names \_\_\_\_\_

Institution(s) of Local Committee \_\_\_\_\_

Provide a brief narrative of why your institution wishes to hold the conference. Be sure to include the advantages of the location, the likely venue of the conference, relative travel costs for people to attend the meeting, and how shorebird conservation in the local area might benefit from hosting the conference. (limited to 500 words) \_\_\_\_\_

The WHSG Executive Committee and many other people are available and willing to provide support for running the conference (e.g., Travel Awards Subcommittee, Lifetime Achievement Awards Subcommittee, Scientific Subcommittee, Finance Subcommittee, etc.). However, many local activities will be done by local people helping the Local Committee. Please indicate who would be available to help do the many tasks. \_\_\_\_\_

Finally, please provide ideas you have about potential local funding sources you may have to offset the costs of the Conference. Include information about ways you may also reduce costs. \_\_\_\_\_

Please indicate likely Conference venue: \_\_\_\_\_

| Yes/No | Facility description   |
|--------|--|
|        | 3 rooms for 3 concurrent sessions, seating for an expected 75-100 in each room |
|        | 1 room with seating for 175 - 200 expected                                     |
|        | Banquet room with facilities to accommodate 200-250                            |
|        | Spot for coffee and snack breaks   |
|        | Spot for poster session and evening socials                                    |
|        | Spot for sponsors / vendors to show wares                                      |

|  |   |
|--|---|
|  | Small room for Executive Committee meeting: seating for 15 around the table and an additional seating for an audience of 15 |
|  | Small rooms that may hold 30 people for 4-5 workshops / side meetings   |

Name of nearest airport (and indicate whether international or regional): \_\_\_\_\_

Cost estimate of one-way shuttle service between venue and nearest airport (if needed): \_\_\_\_\_

Approximate distance and travel time by vehicle from the nearest airport with regularly scheduled commercial service to the conference venue: \_\_\_\_\_

Does the conference meeting facility also include sleeping rooms? (Yes/no)

If yes, list approximate cost and availability for

Single occupancy: \_\_\_\_\_

Double occupancy: \_\_\_\_\_

Are these discounted rates? (yes/no)

If yes, what is the minimum number of sleeping rooms required to obtain the discounted rates? \_\_\_\_

How many sleeping rooms are available for the conference at this proposed facility? \_\_\_\_\_

If conference venue does not have sleeping rooms, what is distance between nearest sleeping rooms and conference meeting facility? \_\_\_\_\_

List other locations where people could sleep and approximate cost / night (be sure to list a few moderately priced hotels within 5 miles of the conference venue): \_\_\_\_\_

\_\_\_\_\_

List any campgrounds or other cheap accommodations within 5-10 miles of the conference venue:

\_\_\_\_\_

Overview of local amenities within walking distance of conference venue (i.e., shops, bars, restaurants, birding, etc.): \_\_\_\_\_

\_\_\_\_\_

### **Conference Revenue and Expenses**

Will commercial meeting services be employed? (yes, no)

WHSG encourages applicants to minimize use of commercial conference services or use other options such as paying part-time staff to assist with the details of running a conference. This option can be much less expensive than commercial services.

If commercial planning is considered, please attach a detailed budget from at least one prospective service provider. Where possible, WHSG encourages proposals from two service providers. The budget should itemize services and miscellaneous costs (e.g., bank charges, credit card fees).

**Registration Fees**

The Local Committee, with advice from the WHSG Conference Chair and the Finance Subcommittee Chair, will need to set a registration fee. These fees typically pay for rental of conference venue (meeting rooms) and associated fees (e.g., audio equipment, snacks, coffee), cost to produce the program book, and 3-4 evening receptions (initial social opener, poster session; and silent auction, and maybe banquet). An additional fee may be charged for those people attending side meetings or workshops to reserve meeting rooms and provide snacks/coffee on non-conference days (or when these are held away from the Conference venue. The registration fee may also cover other items, refer to final conference reports from WHSG conferences posted on the WHSG website. Prices included in the tables below maybe close to what you might expect based on past meetings, although prices vary greatly by locality.

|         | <b>Early</b><br>(up to 4 mo before conference) | <b>Regular</b><br>(2-1 mo before conference) |
|---------|--|--|
| Member  | \$250  | \$300  |
| Student | \$175  | \$200  |

Estimate of Income and Expenses (add rows or edit existing categories as necessary)

| <b>Income</b>   |                          |
|---|--------------------------|
| Item  | Value (estimate in gray) |
| Seed money from WHSG (to be hopefully reimbursed)   | \$1,500 to \$5,000       |
| Sponsor Income  | \$25,000                 |
| Vendor Income   | \$250                    |
| Registration fees   | \$25,000                 |
| Silent Auction  | \$4,000                  |
| Meeting Complimentary Prizes (e.g., T-shirt sales, optional)  | \$500                    |
| Field Trips (depends on a participants payment to vendors or conf. registration)                        | \$500                    |
| Expenses  |                          |
| Repayment of WHSG Seed Money  | \$1,500 to \$5,000       |
| Opening Social  | \$3,000                  |
| Banquet <sup>1</sup>  | \$7,500                  |
| Audio Visual  | \$5,000                  |
| Poster Night Heavy Snacks   | \$4,000                  |
| Venue: rooms reserved for all activities (scientific sessions, Executive Committee meeting, banquet...) | \$5,000                  |
| Conference Program Book Design  | \$2,000                  |
| Commercial Conference Service fees (optional)   | \$5000                   |

|  |                |
|--|----------------|
| Coffee and Snack Breaks  | \$3000         |
| Field Trips (depends on a participants payment to vendors or conf. registration) | \$10000        |
| Plenary Speaker Fees   | \$5,000        |
| Items for registrants (mugs, conference bag, pens, etc.)                         | \$2,000        |
| <b>Profit or Loss Anticipated</b>  | <b>+\$5000</b> |

<sup>a</sup>Program books from past WHSG conferences are stored on the Google Drive.



## Appendix B. Financial Agreement between WHSG and Host Organization

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Financial Agreement  
For the  
\_\_\_ Biennial Conference of the  
Western Hemisphere Shorebird Group  
Hosted by \_\_\_\_\_  
And Co-hosted by \_\_\_\_\_  
On dates  
At the venue  
In location

WHEREAS on dates \_\_\_\_\_ is hosting the biennial conference of the Western Hemisphere Shorebird Group (WHSG) in location and WHEREAS this conference shall be held at the \_\_\_\_\_, and WHEREAS the Treasurer of WHSG shall provide \$\_\_\_\_\_ in start-up funds for the conference to \_\_\_\_\_, \$\_\_\_\_\_ shall be returned to the WHSG Treasurer within 2 months of completion of the conference, and PROFITS incurred as a result of the conference shall HEREBY be distributed in the following manner: 25\_\_\_% to WHSG and 75\_\_\_% to host organization(s) from:

REGISTRATION fees, VENDOR fees, CONFERENCE SPOPNORSHIPS/DONATIONS, RAFFLE/AUCTION, and CONFERENCE-RELATED ITEMS such as T-SHIRSTS.

| Name                                      | Date |
|---|------|
| Chair, Western Hemisphere Shorebird Group |      |

| Name                   | Date |
|------------------------|------|
| Local Committee Member |      |

## Appendix C. Committee Task Assignments and Organizing Timeline

| Timeline (months)        | Task  | Committee <sup>1</sup> |
|--------------------------|---|------------------------|
| 2 + years                | Prepare application to host the meeting, submit to WHSG ExCo  | PLC                    |
| 2 + years                | Develop proposed line item budget, projecting expenses vs. revenues   | PLC, LC, FC            |
| 2 + years                | Identify conference hotel and conference meeting facility (if separate from hotel)  | PLC, LC, CC            |
| <b>2 Year Benchmark</b>  |   |                        |
| 24                       | Maintain finances through all stages of the conference, including final report  | LC, FC                 |
| 22                       | Develop conference logo   | LC                     |
| 22                       | Provide date, location, call for abstracts timelines to WHSG webmaster for posting  | LC, CC                 |
| 22                       | Publicize the conference  | LC, CC                 |
| 22                       | Secure conference sponsors (e.g., foundations, private companies, and government organizations); this can proceed until 3 months prior to the meeting   | LC, FC                 |
| 20                       | Negotiate contract for Conference planner <sup>2</sup> (if needed)  | LC                     |
| 18                       | Negotiate contracts for sleeping room locations (be sure to get final contract with no option to increase rate unless you add items)  | LC, FC                 |
| 18                       | Develop and maintain a conference website (for conference info, abstract submission, & online registration)   | LC, CC, SC             |
| 18                       | Negotiate contract for Conference Meeting Facility (if separate from Hotel), including minimum number of meeting rooms large hall, 3- 4 smaller rooms for concurrent sessions, rooms for breakout meetings, social events, sponsor displays and poster session) | LC                     |
| <b>1 Year Benchmark</b>  |   |                        |
| 12                       | Negotiate contracts for vendors (optional)  | LC                     |
| 12                       | Negotiate contracts for Audio translation services for conference and side meetings   | LC                     |
| 12                       | Negotiate contracts for field trip services   | LC                     |
| 12                       | Work with Scientific Subcommittee to identify and make travel arrangements for plenary speakers   | LC, CC, SC             |
| 12                       | Schedule/organize special symposia/workshops  | SC, LC                 |
| <b>9 Month Benchmark</b> |   |                        |
| 9                        | Determine mechanism to handle credit card transactions over the web   | LC, FC                 |
| 9                        | Schedule/organize scientific sessions (set date for closing of submissions)   | SC, LC                 |
| 9                        | Schedule/organize Mentor/Student Social   | LC, Student rep WHSG   |
| 9                        | Travel Awards Subcommittee begin to implement program (advertise to submit Travel Award applications, decide appropriate housing and food support)  | TAC, LC                |
| 9                        | Finalize abstract template paperwork and open symposium, workshop and general paper/poster submission, add this information to website and advertise  | LC, SC, CC             |
| <b>6 Month Benchmark</b> |   |                        |
| 6                        | Set registration fees and deadlines for submitting early and late registration  | LC, CC, FC             |
| 6                        | Advertise Lifetime Achievement Award nominations  | LC, SC, LAC            |

|                          |   |                              |
|--------------------------|---|------------------------------|
| 6                        | Reserve meeting rooms for scientific sessions, special symposia/workshops, Executive Committee and business meetings, social events and side-meetings | LC, CC, SC                   |
| 6                        | Schedule Executive Committee & Business meetings  | LC, CC                       |
| 6                        | Schedule/organize field trips including transportation and food options   | LC                           |
| 6                        | Organize and advertise Mentor/Student Social  | LC, Student rep WHSG         |
| <b>4 Month Benchmark</b> |   |                              |
| 4                        | Lifetime Achievement Awards Ceremony planning with selection committee  | LAC, LC                      |
| 4                        | Early Registration opens  | LC                           |
| 4                        | Pre-register attendees, handle payments (mostly web but provide cash/credit card opportunities at in-person registration).                            | LC, FC                       |
| 4                        | Provide confirmation to registrants of their registration   | LC                           |
| 4                        | Register attendees, handle payments at the conference   | LC                           |
| 4                        | Organize Banquet menu, awards ceremony, entertainment   | LC, LAC, SC                  |
| 4                        | Organize Evening social   | LC                           |
| 4                        | Organize Icebreaker/reception   | LC                           |
| 4                        | Organize Poster session reception   | LC                           |
| 4                        | Close submission of abstracts   | LC, SC                       |
| 4                        | Organize Mentor/Student Social  | LC, Student rep WHSG         |
| 4                        | Select Travel Award winners and work with them to get airline and other ticketing   |                              |
| <b>2 Month Benchmark</b> |   |                              |
| 2                        | Organize silent auction   | LC, Student rep on WHSG ExCo |
| 2                        | Finalize order of catering services for coffee breaks between paper sessions  | LC                           |
| 2                        | Order name tag materials  |                              |
| 2                        | Design and purchase special conference materials (e.g., T-shirts mugs, hats, tote bags) (# dependent on registrant purchases)                         | LC                           |
| 2                        | Design/produce conference program/abstract book   | LC, CC, SC                   |
| 2                        | If not part of Conference Center contract, locate audio/visual equipment for use at the conference  | LC                           |
| 2                        | Recruit (2m) & schedule (1m) volunteers for registration desk at the conference   | LC                           |
| <b>1 Month Benchmark</b> |   |                              |
| 1m                       | Late registration opens   | LC                           |
| 1m                       | Coordinate audio-visual resources with hotel/conference center  | LC                           |
| 1 w                      | Prepare conference attendance certificates  | LC, WHSG reg rep.            |
| 1 w                      | Prepare conference presentation certificates  | LC, SC                       |
| 1 w                      | Recruit and schedule volunteers to run the AV equipment during presentations  | LC, SC                       |
| 1 w                      | Organize in-person registration and participant's conference materials  | LC                           |
| 1 w                      | Schedule/secure audio-visual equipment  | LC                           |
| 1 w                      | Print name tags for participants, plenary speakers, ribbons for Executive Committee members & officers  | LC                           |
| <b>Conference Held</b>   |   |                              |
| 2 m                      | Complete final budget   | LC, FC, Staff WHSG ExCo      |

|     |   |                            |
|-----|---|----------------------------|
| 2 m | Complete final descriptive report on conference and submit more brief report to Wader Study Journal | LC, FC, Staff<br>WHSG ExCo |
|-----|---|----------------------------|

<sup>1</sup> **PLC:** Potential Local Committee (reflects activity in preparation for submission of an *Application to Host the Biennial Conference of the Western Hemisphere Shorebird Group* (Appendix A); **LC:** Local Committee; **CC:** WHSG Conference Chair; **SC:** Scientific Subcommittee Chair, **FC:** Finance Subcommittee Chair, **LAC:** Lifetime Achievement Award Subcommittee Chair, **TAC:** Travel Award Subcommittee Chair. Time is reported in months (m) and weeks (w). Keep in mind these dates denote when work should **begin** on specific tasks and that frequent follow up is needed.

<sup>2</sup> Local Committee may want to use the services of a professional experienced in negotiating hotel contracts, as better room rates are often the result (contact the WHSG Conference Chair for further information).

## Appendix D. Sample Sponsorship Application

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### Sponsorship Opportunities

**Western Hemisphere Shorebird Group (WHSG)** is devoted to research, public education, and conservation of birds of prey. The Foundation publishes *The Journal of Shorebird Research*, the world's only peer-reviewed journal devoted exclusively to shorebird <http://westernshorebirdgroup.org/>



We invite you to join the Western Hemisphere Shorebird Group in our mission to advance the scientific study and conservation of shorebirds and to further the professional development of our members by becoming a sponsor of the 8th Meeting of Western Hemisphere Shorebird Group (WHSG). This event will be held at the “Hotel El Panama” in Panama City, Panama from 24-28 October, 2019. Details can be found [here](#).

#### The Conference

The WHSG meeting attracts >175 professionals and students from throughout the Western Hemisphere. Our program includes workshops, symposium, plenary lectures, and contributed papers and posters sessions. We are one of the few meetings held in both English and Spanish. Reach a whole new and expanding group of people from Latin America!

**Location. The meeting will be held in Panama City, Panama from 24-28 October 2019.**

Sponsors and exhibitors will receive maximum exposure with booths centrally located in the exhibition hall where poster sessions, coffee breaks, and social activities take place.

#### Levels of Sponsorship

**Whimbrel:** \$5000 or comparable equipment cost; entitles you to one 15 minute presentation slot, complimentary conference registration for up to 3 people, spaces for 2 exhibit booths, advertisement space in program, logo placement in program, website recognition, and meeting recognition.

**Red Knot:** \$3000 or comparable equipment cost; entitles you to complimentary conference registration for up to 2 people, space for 1 exhibit booth, advertisement space in program, logo placement in program, website recognition, and meeting recognition.

**Two-banded Plover:** \$1000 or comparable equipment cost: entitles you to complimentary conference registration for 1 person, advertisement space in program, logo placement in program, website recognition, and meeting recognition.

**Buff-breasted Sandpiper:** \$500 or comparable equipment cost; entitles you to advertisement space in program, logo placement in program, website recognition, and meeting recognition.

**Semipalmated Sandpiper:** other levels (including in-kind equipment donation), entitles you to logo placement in program, website recognition, and meeting recognition.

## Appendix E. Sample Email Announcement: Opening of Conference Registration

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(Sample announcement emailed to the WHSG's interested parties regarding the annual WHSG conference. The announcement was prepared by the Local Committee Chair.)

Dear WHSG enthusiasts,

Registration for the 8th Western Hemisphere Shorebird Group meeting (Oct 24-28, 2019) in Panama City, PANAMÁ has opened. Please take advantage of the early bird registration fee which is in effect until July 15. Note that if you are not living in Panama you should pay your registration by VISA or Master Card. If you live in Panama you should pay by bank deposit or ACH (please request banking details from WHSG2019@audubonpanama.org to pay your registration).

If you applied for a travel award, be aware that travel award winners will not be announced until mid-August at the earliest. To facilitate the completion of your registration for the meeting before the announcement you must select as a method of payment, 'bank deposit or ACH'. Do not select VISA or Master Card.

If you required translation services when you submitted your abstract, this is a friendly reminder you should pay \$25 extra when you register. On the online registration system there is a section you can select to pay this fee.

Here are the important links.

Website: <https://audubonpanama.org/index.php/2-all/89-whsg2019-eng.html>

Online registration

system: [https://www5.shocklogic.com/scripts/jmevent/Registration.asp?Client\\_Id=%27CXPA%27&Project\\_Id=%271910242%27&System\\_Id=2](https://www5.shocklogic.com/scripts/jmevent/Registration.asp?Client_Id=%27CXPA%27&Project_Id=%271910242%27&System_Id=2)

We expect to work on the program for the meeting in mid-July with the support of the Scientific Committee. But we can tell you now that all four plenary speakers have agreed to share their life-time experiences with us: Dr. David Lank (USA), Dr. Cheri Gratto-Trevor (Canadá), Dr. Verónica D'Amico (Argentina) and me, M.Sc. Rosabel Miró (Panamá).

If you are interested in any field trips, please check the box in the online registration system. As soon as the tour operators have finalized the packages they will offer you will receive information about them.

Please do not hesitate to contact us if you have any questions. Our e-mail for this meeting is WHSG2019@audubonpanama.org. Yenifer Díaz and I will be happy to help you.

Saludos,

Rosabel Miró R.

Executive Director

Panama Audubon Society

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Estimados participantes,

Registro para la 8ª Reunión del Grupo de Aves Playeras del Hemisferio Occidental (24-28 de octubre de 2019) en la Ciudad de Panamá, PANAMÁ ha abierto.

Felicitemos a todos por la aceptación de sus resúmenes por parte del Comité Científico. Como mencionó Stephen Brown en su reciente correo electrónico, los problemas técnicos con el sistema de registro en línea se resolvieron y ahora pueden continuar con su registro en la 8ª Reunión del Grupo de Aves Playeras del Hemisferio Occidental. Aprovechen la tarifa de inscripción anticipada que está vigente hasta el 15 de julio. Tengan en cuenta que si no viven en Panamá, deben pagar su inscripción con VISA o Master Card. Si viven en Panamá, deben pagar mediante depósito bancario o ACH (soliciten los datos bancarios a WHSG2019@audubonpanama.org para pagar su inscripción).

Si solicitaron una beca de viaje, tengan en cuenta que los ganadores de las becas de viaje no se anunciarán hasta mediados de agosto, como muy pronto. Para facilitar la finalización de su inscripción para la reunión antes del anuncio, deben seleccionar como método de pago 'depósito bancario o ACH'. No seleccionen VISA ni Master Card.

Si requirieron servicios de traducción cuando enviaron su resumen, este es un recordatorio amistoso que deben pagar US\$25 adicionales cuando se registren. En el sistema de registro en línea hay una sección que pueden seleccionar para pagar esta tarifa.

Aquí están los enlaces importantes.

Sitio web: <https://audubonpanama.org/index.php?id=80:whsg2019-esp&catid=21>

Sistema de registro en

línea: [https://www5.shocklogic.com/scripts/jmevent/Registration.asp?Client\\_Id=%27CXPA%27&Project\\_Id=%27191024%27&System\\_Id=2&Language\\_Code=Esp](https://www5.shocklogic.com/scripts/jmevent/Registration.asp?Client_Id=%27CXPA%27&Project_Id=%27191024%27&System_Id=2&Language_Code=Esp)

Esperamos trabajar en el programa de la reunión a mediados de julio con el apoyo del Comité Científico. Pero desde ya podemos decirles que los cuatro ponentes magistrales acordaron compartir sus experiencias de vida con nosotros: Dr. David Lank (EE. UU.), Dra. Cheri Gratto-Trevor (Canadá), Dra. Verónica D'Amico (Argentina) y yo, Mgtr. Rosabel Miró (Panamá).

Si está interesado en alguna excursión, marque la casilla en el sistema de registro en línea. Tan pronto como los operadores turísticos hayan finalizado los paquetes que le ofrecerán, recibirán información sobre ellos.

Por favor, no dude en ponerse en contacto con nosotros si tiene alguna pregunta. Nuestro correo electrónico para esta reunión es WHSG2019@audubonpanama.org. Yenifer Díaz y yo estaremos encantadas de ayudarle.

Saludos,

Rosabel Miró R.

Directora Ejecutiva

Sociedad Audubon de Panamá

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## Appendix F. WHSG Organization and Conference-specific Logos

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### 7th Western Hemisphere Shorebird Group Meeting

10 - 14 NOVEMBER 2017  
PARACAS - PERU





8th Western Hemisphere  
Shorebird Group  
Meeting

24 - 28 October, 2019  
Panama City, Panama

[WHS2019@audubonpanama.org](mailto:WHS2019@audubonpanama.org)



# 9th. WHSG

9na. REUNIÓN DEL GRUPO DE AVES  
PLAYERAS DEL HEMISFERIO  
OCCIDENTAL

9th. WESTERN HEMISPHERE  
SHOREBIRDS GROUP MEETING

# 2021

1 al 6 de septiembre de 2021 – Puerto Madryn, Argentina

## Appendix G. Sample Email Announcement: Call for Papers, Symposia, and Side-meetings

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The Western Hemisphere Shorebird Group is excited to announce the Call for Papers, Symposia, workshop and side-meetings for the upcoming conference, to be held 24-28 October in Panama City, Panama, and hosted by the Panama Audubon Society.

**Abstracts will be due by 1 May 2019.**

To submit a proposal for a Symposium, please go [here](#) (Link)

**Symposium proposals are due by 15 March 2019.**

Applications for Travel Awards, and nominations for the Baker and Oring Lifetime Achievement awards, will also be due on 1 May 2019. Information for the Baker and Oring Awards is at the WHSG website [here](#). (Link to <http://westernshorebirdgroup.org/awards/>). Travel award information will be posted soon with the Call for Abstracts.

We hope you will consider proposing an abstract, or planning a symposium, and we hope you will attend the meeting in October!

## Appendix H. Sample Travel Awards Program Application Materials

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### TRAVEL AWARD SUBMISSION DEADLINE: May 1, 2019

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Limited funds are available for students from throughout the Western Hemisphere, Latin American professionals, and early career North American professionals (within 3 years of graduating with Master's or PhD) engaged in the study of shorebirds to present their work at the Eighth Western Hemisphere Shorebird Group Meeting (8WHSB) in Panama City, Panama. The travel awards are limited to people working on shorebirds in the Western Hemisphere (people residing in countries outside the Western Hemisphere but working on shorebirds in the Western Hemisphere are eligible to apply).

**Applicants may be selected for travel awards if they have worked on shorebirds in the Western Hemisphere, and if they are either:**

- (1) A student attending a college or university (undergraduate or post-graduate).**
- (2) Early professional from North America who completed their Master's or PhD no earlier than May 2016.**
- (3) A professional from Latin America.**

**Applicants are also expected to:**

- (1) Be an author and submit an abstract for an oral or poster presentation.**
- (2) Present their work either as an oral or poster presentation.**

All applications must be submitted in English (and Spanish if possible).

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### **Important information to apply for a Travel Award:**

- Applicants must submit a single PDF to [Richard\\_lanctot@fws.gov](mailto:Richard_lanctot@fws.gov). Save the PDF as "firstname\_lastname\_8WHSB\_TA.pdf" with all the 7 documents below appended together. *Start each of the 6 documents on a separate page.* Applications that contain multiple pdfs or are not formatted into distinct pages will be rejected.

1. **Cover Page, including:**

1. Name (first, middle, last)
2. E-mail address
3. Institution or organization name

4. Institution address
  5. Country where applicant currently lives, and country where applicant studies shorebirds.
  6. Are you a Latin American professional, North American early professional, or student?
  7. If North American early professional, when did you get your degree and what degree was it?
  8. Title of presentation submitted to the organizing committee (if you are part of multiple talks, please list all of them).
  9. Indicate if you are a speaker for a planned symposium or workshop that will be held during the regular meeting, and if so, which one(s) and the role you will play.
  10. Indicate if you plan to attend a pre-meeting or pre-workshop that will be held prior to the conference. If yes, indicate which one(s) and the role you will play.
2. **Abstract, including:**
1. Title (150 characters maximum)
  2. Name of authors (unlimited text)
  3. Maximum of 250 words of text to describe presentation (does not include title and author names)
- It is okay to use the same abstract that was submitted for the meeting.
3. **Letter of Intent:** The letter should be only one page long and explain why you want to attend 8WHSB, how you plan to share the knowledge / experience gained from your participation when you return to your home site, and a summary of your current, past and potential work with shorebirds.
4. **Curriculum Vitae:** The CV must be no longer than two pages and include current position; past work experience; presentations, reports and publications; and scientific activity.
5. **For student, provide a note of evidence:** For students, please ask your teacher, mentor, or tutor to write a short email (2-3 sentences at most) confirming your student status and agreeing with what you say in your application. Include this email as a separate page in the final pdf.
6. **Budget:** please provide the following
1. City you will fly from to attend the meeting and fly home to after the meeting.
  2. Likely dates of travel considering the meeting is from the 24 – 28 October 2019.
  3. Your estimate of the cost of the airfare for a round-trip ticket to attend the meeting. However, we will work with a travel agency to search for lowest prices.
  4. The amount of funds you can contribute to your attendance at the meeting, and the source of these funds.

5. Efforts you made to obtain funds from other sources to attend the meeting.
  6. Travel awards may include registration fees (either student or professional rate), air tickets, and a fixed allocation of US\$150 for meals and US\$200 for housing to cover the five-day event.
  7. No additional funds will be provided for applicants to attend workshops / meetings before or after the meeting. This means the applicant will be responsible for additional hotel nights, all meals, and any registration fees.
- We will reduce travel awards to 80% of the overall need for all North American and Latin American professionals, and North American students. Latin American students who are selected to receive the award will receive 100% of their need.
  - We are sorry but funds are extremely short, so there is a possibility that not all proposals will be accepted. We suggest looking for additional funds.

---

#### **TRAVEL AWARD APPLICATION - WHSG 2019**

1. **BE SURE TO SUBMIT YOUR TRAVEL AWARD AT THE SAME TIME THAT YOU SUBMIT YOUR ABSTRACT. NO TRAVEL AWARDS WILL BE GIVEN TO PEOPLE WHOSE ABSTRACTS ARE NOT ACCEPTED BY THE SCIENTIFIC COMMITTEE.**
2. **IF POSSIBLE, PLEASE REGISTER PRIOR TO SUBMITTING AN ABSTRACT AND TRAVEL AWARD APPLICATION.**

## **FECHA LÍMITE PARA PRESENTAR BECA DE VIAJE: 1 de mayo de 2019**

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Hay algunos fondos disponibles para estudiantes del hemisferio occidental, profesionales latinoamericanos y profesionales norteamericanos en la fase inicial de su carrera (dentro de los 3 años de graduación con maestría o doctorado) que se dediquen al estudio de aves playeras para presentar su trabajo en la Octava Reunión del Grupo de Aves Playeras del Hemisferio Occidental (8WHSO) en la ciudad de Panamá, Panamá. Las becas de viaje se limitan a personas que trabajan en aves playeras en el hemisferio occidental (las personas que residen en países fuera del hemisferio occidental pero que trabajan en aves playeras en el hemisferio occidental son elegibles para postularse).

**Los solicitantes pueden ser seleccionados para becas de viaje si han trabajado en aves playeras en el hemisferio occidental y si se trata de:**

- (1) Un estudiante que asiste a la universidad (licenciatura o posgrado).**
- (2) Un profesional en la fase inicial de su carrera de Norteamérica que completó su maestría o doctorado después de mayo de 2016.**
- (3) Un profesional de Latinoamérica.**

**También se espera que el o la solicitante:**

- (1) Sea el autor y presente un resumen para una presentación oral o de póster.**
- (2) Presente su trabajo como una presentación oral o de póster.**

Todas las solicitudes deben presentarse en inglés (y en español si es posible).

---

### **Información importante para solicitar una beca de viaje:**

Quien solicite debe enviar un solo PDF a [Richard\\_lanctot@fws.gov](mailto:Richard_lanctot@fws.gov). El nombre del PDF debe ser "nombredepila\_apellido\_8WHSO\_TA.pdf" del solicitante y debe incluir los 6 documentos descritos a continuación. Cada uno de los 7 documentos debe comenzar en página separada. Se rechazarán las solicitudes que contengan varios PDF o que no estén formateadas en páginas separadas.

### **Información importante para solicitar una beca de viaje:**

Quien solicite debe enviar un solo PDF a [Richard\\_lanctot@fws.gov](mailto:Richard_lanctot@fws.gov). El nombre del PDF debe ser "nombredepila\_apellido\_8WHSO\_TA.pdf" del solicitante y debe incluir los 7 documentos descritos a continuación. Cada uno de los 7 documentos debe comenzar en página separada. Se rechazarán las solicitudes que contengan varios PDF o que no estén formateadas en páginas separadas.

#### **1. Portada, que incluya:**

1. Nombre (de pila, medio, apellido)
-

2. Dirección de correo electrónico
3. Nombre de la institución u organización
4. Dirección de la institución.
5. País donde vive actualmente el solicitante y país donde el solicitante estudia las aves playeras.
6. ¿Es usted un profesional latinoamericano, profesional norteamericano en fase inicial de su carrera o estudiante?
7. Si es profesional norteamericano en fase inicial de su carrera, ¿cuándo obtuvo su título y qué título fue?
8. Título de la presentación presentada al comité organizador (si usted es parte de varias charlas, indíquelas todas).
9. Indique si es orador para un simposio o taller planificado que se llevará a cabo durante la reunión regular y, de ser así, cuál (es) y qué papel desempeñará.
10. Indique si planea asistir a una reunión previa o taller previo que se llevará a cabo antes de la conferencia. En caso afirmativo, indique cuál (es) y el rol que desempeñará.

**2. Resumen, que incluya:**

1. Título (máximo de 150 caracteres)
2. Nombre de los autores (texto ilimitado)
3. Máximo de 250 palabras de texto para describir la presentación (no incluye título ni nombres de autores)

Está bien utilizar el mismo resumen que se presentó para la reunión.

3. **Carta de intención:** la carta debe ser de una sola página y explicar por qué desea asistir a la 8WHSB, cómo planea compartir conocimiento / experiencia obtenidos de su participación cuando regrese a su sitio de origen y un resumen de su trabajo actual, pasado y potencial con aves playeras.

4. **Curriculum Vitae:** el CV no debe tener más de dos páginas e incluirá la posición actual; experiencia laboral pasada; presentaciones, informes y publicaciones; y su actividad científica.

5. **Para estudiantes, proporcionar nota de evidencia:** para los estudiantes, pídale a su profesor, mentor o tutor que por favor escriba un breve correo electrónico (2 o 3 oraciones como máximo) confirmando su estado de estudiante y aceptando lo que dice en su solicitud.

6. **Presupuesto:** por favor indique lo siguiente

1. Ciudad desde la que volará para asistir a la reunión y volar a casa después de la reunión.
2. Las fechas probables de viaje considerando que la reunión será del 24 al 28 de octubre de 2019.

3. Su costo estimado de la tarifa aérea para un boleto de ida y vuelta para asistir a la reunión. Sin embargo, trabajaremos con una agencia de viajes para buscar los precios más bajos.
  4. La cantidad de fondos que puede aportar a su asistencia a la reunión y la fuente de estos fondos.
  5. Esfuerzos realizados para obtener fondos de otras fuentes para asistir a la reunión.
  6. Las becas de viaje pueden incluir tarifas de inscripción (ya sea tarifa para estudiantes o profesionales), boletos aéreos y una asignación fija de US \$ 150 para comidas y US \$ 200 para alojamiento que cubra el evento de cinco días.
  7. No se asignarán fondos adicionales para que los solicitantes asistan a talleres / reuniones antes o después de la reunión. Esto significa que el solicitante será responsable de los gastos de noches de hotel adicionales, todas las comidas y cualquier tarifa de registro.
- Reduiremos las becas de viaje al 80% de la necesidad general de todos los profesionales norteamericanos y latinoamericanos, y los estudiantes norteamericanos. Los estudiantes latinoamericanos seleccionados para recibir la beca recibirán el 100% de sus necesidades.
  
  - Lo sentimos, pero los fondos son muy escasos, por lo que existe la posibilidad de que no todas las propuestas sean aceptadas. Sugerimos buscando fondos adicionales.

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#### **SOLICITUD DE BECA DE VIAJE - 8WHSG**

- 1. ASEGÚRESE DE SOLICITAR SU BECA DE VIAJE AL MISMO TIEMPO QUE PRESENTE SU RESUMEN. NO SE OTORGARÁN BECAS DE VIAJE A LAS PERSONAS CUYOS RESÚMENES NO SEAN ACEPTADOS POR EL COMITÉ CIENTÍFICO.**
- 2. SI ES POSIBLE, POR FAVOR REGÍSTRESE ANTES DE PRESENTAR SU RESUMEN Y SOLICITUD DE BECA DE VIAJE.**



# Appendix I: Lifetime Achievement Awards Nomination Guidelines

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## **WHSG Awards: Nomination Guidelines**

Deadline: Nominations are due on 1 May.

Nominations for the two WHSG awards (Allan Baker, Lewis W. Oring) may be submitted electronically by any person to Richard Lanctot, the chair of the WHSG Awards Committee (e-mail: [Richard\\_lanctot@fws.gov](mailto:Richard_lanctot@fws.gov)). Please be sure to submit your award nomination in English and Spanish.

The WHSG Awards Committee recommends that awards be limited to individuals or teams who have conducted most of their shorebird conservation/research within the Western Hemisphere, and recommends individuals or teams receive an award only once.

*Allan Baker Lifetime Achievement Award for Shorebird Conservation:* An individual or team is eligible for the award. Nominations should include: (1) the name, institution, and contact information for the nominee(s), (2) a current CV of the nominee(s), and (3) a written summary for why the nominee(s) should be considered, including statements on conservation accomplishments, his/her/their leadership in avian conservation, and documentation of the conservation implications of the candidate's work.

*Lewis W. Oring Lifetime Achievement Award for Shorebird Research:* An individual or team is eligible for the award. Nominations should include: (1) the name, institution, and contact information for the nominee(s), (2) a current CV of the nominee(s), and (3) a written summary for why the nominee(s) should be considered, including statements on research accomplishments, his/her/their leadership in avian research, and how the candidate's research has advanced the scientific understanding of shorebirds and of science overall.

The award recipient will receive a plaque, a monetary award, and be invited to give a plenary talk at the following Western Hemisphere Shorebird Group meeting.

Appendix J. Example Participation and Presentation  
Conference Certificates





## Western Hemisphere Shorebird Group

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Eighth meeting of the Western Hemisphere Shorebird Group,  
Panama City, Panama

23 – 30 October 2019

This certificate acknowledges

<*insert name*>

Provided a presentation entitled  
< insert title of talk >.

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Eveling Tavera Fernandez  
Chair, Western Hemisphere Shorebird Group

