Guidelines for RO-MAN Organizing Committee, specifically addressing diversity and inclusion

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This document serves to propose best practices and new positions for diversity and inclusion in the IEEE RO-MAN conference Organizing Committee, based on best practices at other conferences and international scientific organizations (e.g. IEEE, ACM).

Conference organization:

While pre-Covid 19 all conferences were held in-person, due to Covid conferences had to move to a virtual format. This also led to some reflections that are also relevant for a time after the Covid pandemic: First, virtual conferences have been **highly inclusive**, they can allow a very reduced registration fee for non-presenter attendees which allows participation when otherwise high travel and registration costs would prohibit participants to attend the conference, e.g. for participants from less developed countries. Second, researchers have become more aware of the **carbon footprint** of international travel, in particular air travel, and its impact on our climate. Third, the virtual format also allows participation of those with **care responsibilities or medical conditions** that prohibit travel, and enables participation for those who cannot get visas in time (visa-applications for certain countries now can take up to 2 years, or won't be granted at all, which makes it infeasible for many researchers to attend international conferences, depending on location). In addition, a fully in-person format will not be able to deal with **future possible pandemics, or political, societal or environmental events** that can prevent travel on a large scale and could thus jeopardize conferences.

However, an in-person experience, if possible, is **crucially important for networking** and the effective **face-to-face exchange of ideas**, particularly important for younger generations of researchers and academics.

Thus, in order to reconcile those issues and take advantage of both in-person and virtual formats, **the**

Standing Steering Committee decided that IEEE RO-MAN conferences must be held in a fully hybrid format. Note, a hybrid format includes that remote presenters or non-presenters <u>can watch all sessions in real-time and have a means to engage and communicate with other virtual or in-person participants.</u>

General Guidelines for Organizing Committee Composition

The committee organization should strive to broaden participation from underrepresented groups. This includes but is not limited to: gender diversity, a diversity of countries with meaningful representation from at least 3 continents, underrepresented ethnicities, a diversity of seniority levels
(e.g. junior vs. senior faculty) and socio-economic backgrounds. If in the following we refer to 'gender balance' we also include balance regarding underrepresented groups.

General chair: In case one person is not available, it is encouraged to have co-chairs to share the workload. Co-chairs should ideally represent a diversity of institutions (but not all from the same institution), and preferably from similar time zones to facilitate efficient communication and decision-making.

Program chairs: Program chairs (3-4) should represent at least 3 different continents, and should be gender balanced. As this is one of the most important and time-demanding roles on the OC, program chairs should be carefully chosen by the general chairs based on prior knowledge or evidence that they can effectively and responsibly carry out their duties.

Finance and registration chair: It is suggested that the general chairs select a finance and registration chair from the same country/institution as the general chair. This will facilitate interaction with attendees regarding their attendance and participation, as well as organization with respect to host currency, taxes, etc.

Special Sessions, Video, Workshops, and Publications chairs: For all of the different roles, typically 2-4 committee members should be chosen, reflecting a diversity of countries and gender.

Awards chairs: This position is impactful on students and carries a great deal of importance. As such, the awards co-chairs should be selected with diversity of gender, continents and cultures in mind. Three or five people are suggested in order to address ties. Typically awards chairs are more senior people. The workload is relatively mild and concentrated towards the end of the conference preparation.

Competition chair: This chair (or chairs) can be flexibly chosen in case of a virtual competition, but in case the competition will take place in-person, a chair who is local to the host city will be preferable to facilitate preparation and arrangements.

Publicity chairs: The publicity chairs should comprise 3 to 5 people from different continents who are well-known internationally from different continents. Ideally, they should be able to reach out to different sub-communities relevant to the conference.

Virtual organizing chairs: These chairs should represent at least 2 continents in order to represent a diversity of time zones, and are responsible for encouraging engagement and interaction among all attendees when the conference is offered in a hybrid or virtual format. For instance, co-chairs may create asynchronous virtual spaces where attendees can chat throughout the conference, promote and monitor social media channels for the conference, and develop online social activities. They will work closely with the inclusion and website team (and, if applicable, online conference vendor) to ensure that the conference program activities are promoted and offered in an attractive manner to ensure networking and engagement for attendees, especially those traditionally not represented at the conference. Gender balance should also be strongly considered.

In addition, new proposed positions are as follows:

Accessibility Chair – This chair is responsible for ensuring that the conference is inclusive for people with disabilities. For virtual conferences, this may include, but is not limited to, closed captioning or live transcription for all aspects of the conference and ensuring alt-text is supported in published conference papers. For in-person conferences, this can include helping the general chairs select accessible venues (e.g. ramps, elevators with braille), organizing sign language interpreters, quiet spaces for people to socialize who are hard of hearing, have sensory issues requiring places to recharge, etc.

The accessibility chair will organize vendors and work early on with the conference chairs to include accessibility plans in the budget. They will also create and distribute best practices for running accessible sessions. They will ensure the website adheres to IEEE's statement on accessibility, meeting the W3C's Web Content Accessibility Guidelines (WCAG) 2.0 Level A. Furthermore, they will engage early with the attendees (prior to the early registration deadline) to gather additional requests or accessibility requirements. This person should be experienced and well-versed in accessibility needs, and preferably a senior member of the RO-MAN community such as a faculty member (or graduate student co-chaired with a faculty member) in order to have influence across all relevant aspects of the conference, including website, submission and review process, registration, proceedings, social events, venue, presentations, meals.

References:
https://ieeemce.org/planning-basics/general-guidelines/accessibility-guidelines/
https://ieeemce.org/planning-basics/general-guidelines/promoting-inclusion/#!/workspaces/
https://www.sigaccess.org/welcome-to-sigaccess/resources/accessible-conference-guide/#chair
https://www.sigaccess.org/accessible-virtual-conferences/

Inclusion Chair – This chair is responsible for ensuring that the conference is inclusive and accessible to people historically underrepresented at the conference. One of their mandates is to broaden participation globally and lower barriers to participation. For a virtual or hybrid conference, global inclusion initiatives may include ensuring that the conference program is accessible to time zones worldwide, providing options for attendees with devalued currencies, and considering those with less reliable access to the internet. The inclusion chair may organize or support special sessions on inclusion or social events for underrepresented communities, and plan a budget for their initiatives. The chair will also ensure other organizers include considerations for attendees with caregiving or family responsibilities. They will promote their inclusion initiatives on the conference website, and encourage inclusion from as early as the Call for Papers. In order for this organizer to have a meaningful impact on the conference, the inclusion chair should be well integrated into the main organizing committee. The inclusion chair can consider creating a committee (or co-chairs) including members from at least 3 different continents.

References:

https://ieeemce.org/planning-basics/general-guidelines/promoting-inclusion/

https://ieeemce.org/planning-basics/general-guidelines/childcare-at-conferences/

https://chi2022.acm.org/organizing/organizing-committee

https://aaai.org/Conferences/AAAI-20/aaai-20-diversity-inclusion/

https://roboticsconference.org/2020/attending/inclusion/index.html

https://www.robot-learning.org/attending/inclusioncorl

https://nips.cc/Conferences/2019/DiversityInclusion

Allyship chairs are the point of contact ("allies") for attendees regarding any violations of the IEEE Code of Conduct, which prohibits discrimination, harassment, or bullying in any form at IEEE-related events. This team of at least 3 people will preferably have experience in inclusion or related work. The chairs will create a reporting system such that any attendee who witnesses violations of the Code of Conduct at the conference can contact the allyship chairs as first responders, who will then escalate issues appropriately to general chairs and IEEE. The allyship chairs will ensure that they and/or designated personnel are familiar with basic bystander intervention, harassment and discrimination management, relevant policies and other equity procedures recommended by IEEE and/or other sources including their academic institution. Finally, the chairs can also work with the organizing committee and local chairs to review the event organization towards preventative measures.

Note, IEEE has dedicated IEEE CARES (Committee to Aid Reporting on Misconduct Concerns:

https://www.ieee-ras.org/about-ras/diversity-page/ieee-ras-cares   ) committee that can be involved.

References:

https://www.ieee-ras.org/about-ras/diversity-page/ieee-ras-cares

https://chi2022.acm.org/

https://chi2022.acm.org/organizing/organizing-committee/

https://focs2021.cs.colorado.edu/code-of-conduct/

https://www.ieee.org/content/dam/ieee-
org/ieee/web/org/conferences/Event%20Conduct%20and%20Safety%20Statement.pdf

https://chi2019.acm.org/for-attendees/equity/#allyship

Sustainability Chairs

The sustainability chairs will track and consider RO-MAN's environmental impact, advising on purchasing decisions, hybrid or virtual conferencing, and carbon offsetting.

References:

https://chi2022.acm.org/

https://chi2022.acm.org/organizing/organizing-committee/

Some Guidelines to Host Hybrid Conferences

Hybrid conferences, combining in-person and virtual elements, are becoming increasingly popular due to their potential to reduce carbon footprints and improve accessibility [1]. Attendees generally prefer hybrid formats, with 56.9% favoring this approach in a recent survey [2]. To design successful hybrid events, organizers should prioritize both the experience of the in-person attendees as well as the online ones.

Here we outline possible guidelines for the organization of virtual conferences, tapping into existing strategies and principles employed in the last years.

[1] Bajpai, V., Hohlfeld, O., Crowcroft, J., Keshav, S., Schulzrinne, H., Ott, J., ... & Raake, A. (2022). Recommendations for designing hybrid conferences. ACM SIGCOMM Computer Communication Review, 52(2), 63-69. 10.1145/3544912.3544920

[2] Ram, S.S., Stricker, D., Pannetier, C. et al. Voices of conference attendees: how should future hybrid conferences be designed? BMC Med Educ 24, 393 (2024).

https://doi.org/10.1186/s12909-024-05351-z

Types of Hybrid Formats

We consider three types of hybrid conferences, based on [1]:

1. **Passive hybrid:** only local participants engage interactively, while remote attendees watch live-streamed sessions. Research presentations may be pre-recorded or live, sometimes alternating within a session. Interactive elements like panels remain local, and remote participants can only ask questions through non-interactive channels like email or Slack.

2. **Semi-passive hybrid:** both local and remote participants attend, but only locals can present or be panelists. Remote attendees can engage by asking questions via chat, while presentations may be live or pre-recorded.

3. **True hybrid:** presenters and audience members may be both local and remote.

Option n.1 priorities in-person participation and is more cost-effective, while the third one can incur a relevant amount of costs for the conference organization, but is the more engaging for the remote participants. It has to be noted that many conference centers are now already equipped with A/V solutions. These types of venues should be prioritized since they are less likely to incur A/V set-up issues.

Prerecording of presentation might be used as a backup in case of connection issues. However, an extensive use of pre-recorder presentations might impact on the in-person experience. My suggestions would be to limit the use of pre-recorded contributions in favor of live (even if remote) presentations.

Technical aspects to take under consideration

- **Audio:** fundamental for a successful conference, for both in-person and virtual attendees.
  - ➤ **Possible solutions:** microphone arrays, handheld wireless microphones, laptop microphones (require muted speakers to prevent feedback).
- **Video:** helps improve engagement from both in-person and virtual attendees.
  - ➤ **Possible solutions:** Audience Video Capture, Two-Screen Setup helps integrate remote participants (one screen for presentation, another for remote audience).
- **Floor Control & Q&A:** should also be well structured to more effectively encourage exchange of ideas.
  - ➤ **Possible solutions:** Text Chat for Questions. Session chairs and volunteers have to be appropriately trained to involve remote attendees. Better to have two distinct chairs.

Logistics, Finances, and Privacy in Hybrid Conferences

- **Higher Complexity & Costs**: Hybrid events are harder to plan and often more expensive than fully virtual or in-person events due to uncertain attendance numbers and additional AV and streaming costs.
- **Setting Registration Fees**: Balancing fees between in-person and remote attendees is difficult. High venue costs and production expenses remain fixed regardless of attendance. Previous conferences have used the policy to have a single rate for authors (both in the case of in-person attendance and online) and a reduced fee for online participants that are not authors of a paper.
- **Sponsorship Challenges**: Lower-cost remote participation may reduce the perceived need for travel grants, shifting sponsorship models toward fee waivers for remote attendees.
- **Recording & Data Transparency**: Attendees must be informed about which parts of the event are recorded and how personal data (e.g., names in text chats) will be used.
- **Security Risks**: Hybrid events are vulnerable to disruptions like "Zoom bombing," requiring additional staffing for monitoring and technical support.
- **Monitoring of the attendance**: The appropriate streaming platforms have to be used in order to monitor that only persons registered to the conference can attend.

Hybrid conferences demand careful financial planning, clear communication on privacy, and strong security measures to ensure smooth execution.

Key Points on Organizing Virtual Conferences

General Considerations

- Virtual conferences require just as much planning, logistics, and people power as physical ones.

- Organizing committees remain similar but must adapt roles to an online setting.

- Technology alone does not ensure success; interaction and engagement strategies are crucial.

- The remote participation has to be allowed but not at the expense of the in-person experience. It is important to avoid audio/video or connection issues causing delays or interference with in-person activities.

Organizing Committee Roles

- **Local Virtual Arrangements Team**:
  - ➢ Manages the conference platform(s) instead of physical venues.
  - ➢ Requires technical expertise in streaming, A/V, and session hosting.
- **Session Chairs/Teams**:
  - ➢ Moderate sessions, introduce speakers, and manage Q&A.
  - ➢ Require training in handling pre-recorded and live content.
  - ➢ May need assistance from student volunteers for tech management.
- **Social Interaction & Entertainment**:
  - ➢ Crucial for engagement, beyond traditional conference content.
  - ➢ Includes interactive activities, networking spaces, and entertainment.

Virtual Presence & Engagement

- **Live cast vs. Interactive Sessions**: Speakers need audience engagement beyond passive viewing.

- **Text Chat as Social Glue**: Facilitates interaction and engagement, needs moderation.

- **Balancing Chat Channels**: Too many cause confusion; too few limit discussion.

Time Zone Challenges

- **Staggered Plenary Sessions**: Optimized for global attendance at key time slots.

- **Pre-recorded Presentations**: Allow wider accessibility.