Un-Meeting
Event Guide
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Introduction: What’s an Un-Meeting?

Concept

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

In June 2018, CLIC hosted a consortium-wide Un-Meeting at the University of Rochester, which brought together over 100 researchers, clinicians, and public health professionals to discuss how to best address the opioid crisis through translational science and research. Attendees from more than 40 institutions, agencies and companies from across the country discussed a variety of opioid-related topics, forged new partnerships and collaborations, and developed ideas to tackle the crisis.

This recap video shares highlights from CLIC’s first Un-Meeting. Additional information and resources from the event can be found here.

Additionally, this brief video from the University of Montana provides a nice overview of the overarching Un-Meeting concept.
Why Should My Hub Host an Un-Meeting?

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

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

Goals

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

Attendee Perspectives

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

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

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

“Great stats, great people!”

“It was enjoyable and engaging.”

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

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

Theme Identification

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

Proposed Un-Meeting themes should particularly be focused on key issues in translational science, or directives outlined by the National Center for Translational Sciences (NCATS) including scientific translational problems on NCATS’ “to-do list,” as outlined in Dr. Chris Austin’s presentation at the 2017 Fall CTSA Program Meeting.

Invitation to Attend

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

High-Level Logistics

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

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

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

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

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

Key Elements

4x4 Presentations
As mentioned, Un-Meetings are generally unstructured in nature and the content of the event is largely driven by participants. To set the stage for engaged networking and discussion, these events typically begin with 4x4 presentations. These extremely brief presentations get their name from their layout: 4 slides in 4 minutes (No-excuses! Typically, a fifth title slide only provides transition between speakers.)

A successful Un-Meeting has a good mix of subject matter experts to tackle these 4x4 presentations, and to help frame the issues and identify key topics. Think: local, national, academic, medical, community-driven, political, etc.
Idea Generation
Following the 4x4 presentations, attendees gather together to identify the subjects and topics they are most interested in discussing. The participants write down the topics of their choice on post-it notes, which are later organized by event coordinators into logical categories — these categories create the topics for each of the break-out sessions. (Note: It may be helpful to have site staff go first to place ideas on the large board in order to encourage participation).

Break-Out Sessions
Once the break-out sessions are identified from the idea generation portion, participants head to whatever session they are most interested in; whether they’re experts on the matter, or simply eager to hear new perspectives.

First “Un-Rule”: The Law of Mobility/The Law of Two Feet
It’s important to communicate to participants that, by design, Un-Meetings are very fluid and flexible in nature. If an attendee chooses a break-out session that they later find themselves uninterested in, they should feel empowered to leave the session and check out a different one. Attendees are free to go where their interests lie, and leave if their interest wanes.
Other “Un-Rules”
Your team can choose the right “un-rules” for your event and team philosophy. The spirit of these is creation of a welcoming space where people are free to share, be heard and drive their own learning.

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

Identifying Your Team

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

Steering Committee

A Steering Committee should be established early in the process to help guide and inform the planning and development of the Un-Meeting. It can be helpful to have representatives with diverse expertise from academia, industry, government, patient groups and other organizations. The event organizers and Steering Committee may choose to meet more frequently, however at least two group meetings will help ensure direction and implementation.

Steering Committee members may be selected for a variety of reasons, including:
- Knowledge leaders on the Un-Meeting Theme
- Representatives from across different sectors
- Able to provide or identify subject matter experts for the 4x4 sessions.
- Assist identification of potential ideas for synergistic activities to promote future collaboration
- Advise on approaches to engage multi-disciplinary participants

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

Event Organizers

A well-managed event requires careful planning. It is therefore critical to appoint a lead event organizer for your event. S/he along with a core team of event organizers and support staff will be needed to
ensure that the event goes smoothly. This team will be responsible for organizing, managing and directing the event process. Given the complexity of this role, it is helpful to maintain detailed records of each step along the way.

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

**Master(s) of Ceremonies (MC)**

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

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

**Promotion/Communication Coordinator**

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

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

*Please reference appendix E for a sample Communications Plan.*

**Conversation Catalysts**

Despite the premise that those in the room are the right people at the time for the discussion, the conversation may need some support. Your team may choose to assign a presenter from the 4x4 session and/or a staff member to a relevant discussion room, based on topic and level of experience.
A suggestion is to prepare each individual with a series of open-ended questions that can support or help catalyze the conversation if there is a lull in discussion. This is a fine line, since attendees are encouraged to use the “Law of Two Feet” and move to a different conversation (or none at all) as they so choose. It is important that a Conversation Catalyst understands that his/her role is supportive and not directive.

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

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

**Day-of Event Support**

The day-of event support is a critical element of your team. In order to ensure that the event runs smoothly and seamlessly, you’ll need to put together a team of people who are able to assist with the following tasks throughout the day:
- Set-up and take-down
- Sign-in/registration
- Food and beverage coordination
- Direct traffic, greet participants, answer questions, etc.
- Floaters without direct responsibility to assist as back up for all tasks

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

**Team Member Roles & Responsibilities**

To keep everyone organized and accountable, it may be beneficial to build out a roles and responsibilities chart, outlining key team members along with their corresponding responsibilities. One team member would ideally be responsible for creating the chart and keeping it up-to-date on a weekly basis (or more often as the event approaches).
Sample roles & responsibilities chart:

<table>
<thead>
<tr>
<th>Team Member</th>
<th>Roles &amp; Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teammate 1 (Event Organizer)</td>
<td>• Maintain and update budget</td>
</tr>
<tr>
<td></td>
<td>• Book hotel block</td>
</tr>
<tr>
<td></td>
<td>• Finalize catering order</td>
</tr>
<tr>
<td></td>
<td>• Tracking stipend nominees</td>
</tr>
<tr>
<td></td>
<td>• Processing reimbursement</td>
</tr>
<tr>
<td>Teammate 2 (Communications Coordinator)</td>
<td>• Finalize pre-event blog post</td>
</tr>
<tr>
<td></td>
<td>• Reach out to local media with event pitch</td>
</tr>
</tbody>
</table>

Institutional Support

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

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

Logistics

Attendee Registration

Registration can be accomplished through an online platform such as Eventbrite. If your institution does not have access to a registration tool, CLIC can provide assistance with REDCap (Note: CLIC can share .xml files for upload to REDCap if needed). Ensure an appropriate registration maximum well above the target attendance goal. Determine the registration close date prior to releasing the registration link and track registration along the way. An example registration form can be seen here.

Items to promote in registration materials:

- Date, time and duration
- Theme
- Location
- Hotel block arrangements
- Attire – typically casual is appropriate

Items to request in registration:

- Name and contact (phone, email)
- CTSA Program hub affiliation
• Brief bio – background and related expertise/interest
• Photo
• Release for photo and video coverage

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

Agenda Creation

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

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

Equipment & Supplies

• Large board for idea generation
• Post-it Notes (“sticky pads”) (many!)
• Post-it Boards and/or whiteboards
• Painters tape (method to create the idea board)
• Sharpies/markers
• Portable table near the idea board (for writing on)
• Signage for breakouts
• Pens
• Name tags
• Table cloths
• Video timer (iPad/Tablet) for 4x4
• Microphone(s) / PA system
• Free standing screens to replay the 4x4s during lunch / break

Printed Materials

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

• A welcome message
• Information about the event organizers and planning team
• Logistical details
• Event background
• Reference materials
- Attendee background/bios

These books can be sent out electronically prior to the event, and also distributed as hard copies on the day-of. A sample briefing book can be seen [here](#).

Additionally consider how attendees will receive materials after the Un-Meeting. A summary booklet can include pictures and contact information for all attendees, with the addition of idea generation and topic discussion information gathered at the Un-Meeting.

**Funding & Collaboration Opportunities**

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

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

**Signage**

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

**Sample signage:**

![Un-Meeting: Addressing the Opioid Crisis through Translational Science](image1)

*Un-Meeting: Addressing the Opioid Crisis through Translational Science*

Saturday, June 2, 2018

University of Rochester Medical Center

Rochester, NY

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![Registration](image2)

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![Auditorium](image3)
Food & Drink

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

We recommend working with your institution’s events department if you’re not sure where to look for reliable catering companies. You’ll want to set up the food stations in a central and easily accessible location within your event.

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

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

Sample food & drink outline:

Before the Un-Meeting
- Host a pre-event reception or schedule a meet-up location
  - Light hors d’oeuvres
  - Cash bar

During the Un-Meeting
- Coffee replenished throughout the day
- Breakfast
- Lunch
- Snacks

After the Un-Meeting
- Post-event reception
  - Local social setting

Photography & Videography

You may want to consider the use of professional, or non-professional, photography and videography to document the success of your event. These materials are extremely helpful to share on social media, to pass along to local media outlets and to repurpose for future Un-Meeting promotions.

Consider reaching out to your institution’s marketing and/or communications department for a list of in-house or recommended local videographers and photographers.
Be sure to collect appropriate permissions from attendees and presenters if you do plan to pursue photo and video on-site. Consider outreach to your institution’s public relations, marketing or event-planning teams for specific guidance about your institution’s requirements.

Set-up & Take-down

Set up
When working with the venue, you’ll want to quickly establish the time at which the Un-Meeting team can arrive on the day of the event. You may also want to set up in advance if possible. Room set-up should be conducive to group conversations where everyone can see one another; horse-shoe or circular configurations are best. 4x4 presentations should be loaded and ready to go.

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

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

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

The “Secret Sauce”

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

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

Communications Plan

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

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

A sample communications plan outline is available in appendix E.

Marketing & Branding

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

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

Sample material:
Media Relations

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

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

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

A sample media pitch is available in appendix B.

Additional Content

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

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

Sample social promotion:
Engaging the CTSA Program Consortium

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

- **Website**
  - Hubs can submit ‘Consortium News’ stories via the CLIC website
    - You can access this submission form by logging into the CLIC website and clicking Submit Consortium News
  - Hubs can submit events to highlight on the CLIC website
    - You can access this submission form by logging into the CLIC website and clicking Add Event on the Events page

- **Social media**
  - Send CLIC content to promote via Twitter and share with NCATS for possible social promotion
  - Use a hashtag at the Un-Meeting so that participants can link comments through their own social media accounts
    - #CTSA_UnMeeting and #CTSAProgram

- **Newsletters**
  - There are a few different newsletters which you may be able to leverage to promote your Un-Meeting
    - CTSA Program Update – once monthly newsletter about high-level program updates
      - Send content to CLIC for possible inclusions
    - CLIC News Roundup – bi-monthly newsletter focused on news
      - Send content to CLIC for possible inclusions

**Budget**

**Budget Considerations**

The Un-Meeting host is responsible for all costs incurred as a result of marketing, venue, food, travel stipends, etc. It is recommended that all costs be tracked, regardless of whether they are eligible to be reimbursed by CLIC (i.e. staff time).

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

*A sample budget template is available in appendix G.*
Evaluation

Capturing Comments

Create a plan to capture the rich ideas and information generated from attendees during the event.

- This may take the form of documentation in the discussion rooms on large white boards or large Post-It boards. Taking pictures of these idea boards will assist in information gathering.
- Your team may choose to have attendees reconvene at the close of the day and share key concepts, ideas, or thoughts generated. Assign a scribe to document these.
- Taking photos of the idea boards can be helpful for quickly capturing all the information for later transcription.

Measuring Success

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

Potential questions to ask on the follow-up evaluation:

- What was your favorite aspect of the event?
- What did you think about the ‘Un-Meeting’ format?
- What would you have changed about the event?
- Do you have any open-ended feedback about the event?
- Did you meet anyone that you foresee collaborating with in the future?

Sample evaluation survey:
CLIC’s survey from the Opioid Crisis Un-Meeting is available here.

Team Debrief

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

Survey Contact
For more information about how CLIC can assist with evaluation, please contact: surveys@clic-ctsa.org.

Longitudinal Follow-Up

Consider developing metrics of success for your Un-Meeting, both short and long-term. Longitudinal follow-up after the event at six months, 12 months and beyond can provide the opportunity to learn more about collaborations that may have developed starting with your Un-Meeting – things like new mentoring relationships, research partnerships, publications and funding opportunities are all potential outcomes of the multi-disciplinary collaborations that may emerge from Un-Meeting events.
Think about the best ways to report on these collaborations – perhaps a blog post, an infographic, a news release, etc. You’ll want to show your institution, your community, your hub and the national consortium how valuable your event was.
Appendix

A: Hub Travel Award Nomination and Processing

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

Additionally, CLIC funded travel awards must be documented and justification must be available if requested. It is expected that the funded hub will reimburse the travel awardees directly and invoice CLIC for all expenditures in one sum. It is recommended that the host location appoint 1-2 individuals to track expenditures and aggregate receipts.

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

Stipend Process

1. Create nomination form  
   a. An example of the nomination form used can be see [here](#).
2. Call for stipend nominations  
   a. Promote nomination form and request letter of support (LOS)  
   b. Email PI and/or Administrators
3. Track nominees  
   a. An example/blank tracking form can be obtained [here](#)
4. Nomination end date (1 month prior to event date)
5. Nomination acknowledgement letter sent nominee/hub PI (email) example can be seen [here](#)  
   a. Describe reimbursement process and *hotel reservation date restriction if being granted*
6. Nominee registration
7. *Hotel reservation made (separate from general registration- if granting hotel costs as well)*
8. Event
9. Obtain travel receipts / reimbursement information
10. Process reimbursement
B: Sample Media Pitch

Dear XXX,

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

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

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

Please let me know if you have any questions!
Thanks!
XXX
Since each host will have a unique approach and process, this example is not meant to be all inclusive or completely representative of the items and timeline leading up to the Un-Meeting.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core team</td>
<td>Finalize</td>
<td>5-6 months prior</td>
</tr>
<tr>
<td></td>
<td>Meet</td>
<td>5-6 months prior</td>
</tr>
<tr>
<td></td>
<td>Meet on established frequency</td>
<td>1-2x/month</td>
</tr>
<tr>
<td></td>
<td>Determine additional staff as needed and onboard</td>
<td>2 months prior</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Steering Committee</td>
<td>Core team identifies SC members</td>
<td>4.5 months prior</td>
</tr>
<tr>
<td></td>
<td>Letter to invite SC members</td>
<td>4.5 months prior</td>
</tr>
<tr>
<td></td>
<td>First meeting, establish philosophy &amp; milestones</td>
<td>4 months prior</td>
</tr>
<tr>
<td></td>
<td>Second meeting, milestone check in</td>
<td>2 months prior</td>
</tr>
<tr>
<td></td>
<td>Additional meetings as needed</td>
<td>As needed</td>
</tr>
<tr>
<td>Venue</td>
<td>Identify spaces needed</td>
<td>4-5 months prior</td>
</tr>
<tr>
<td></td>
<td>Find appropriate venue</td>
<td>4 months prior</td>
</tr>
<tr>
<td></td>
<td>Contract for date</td>
<td>3.5 months prior</td>
</tr>
<tr>
<td></td>
<td>Communicate specific needs to facility contact</td>
<td>2 months prior</td>
</tr>
<tr>
<td></td>
<td>Walk through</td>
<td>1.5 months prior</td>
</tr>
<tr>
<td>Hotel</td>
<td>Research local hotels for group rates</td>
<td>3-4 months prior</td>
</tr>
<tr>
<td></td>
<td>Sign room block contract</td>
<td>3 months prior</td>
</tr>
<tr>
<td>Registration</td>
<td>Create and finalize registration form</td>
<td>3 months prior</td>
</tr>
<tr>
<td></td>
<td>Open and promote registration</td>
<td>2.5-3 months prior</td>
</tr>
<tr>
<td></td>
<td>Close registration</td>
<td>2-3 weeks prior</td>
</tr>
<tr>
<td>Travel awards</td>
<td>Create and finalize nomination process</td>
<td>3.5 months prior</td>
</tr>
<tr>
<td></td>
<td>Process nominees</td>
<td>3 months prior</td>
</tr>
<tr>
<td></td>
<td>Send award notification</td>
<td>2 months prior</td>
</tr>
<tr>
<td></td>
<td>Provide reimbursement</td>
<td>As receipts are received</td>
</tr>
<tr>
<td>Signage</td>
<td>Work with designer</td>
<td>4 months prior</td>
</tr>
<tr>
<td></td>
<td>Finalize images</td>
<td>3 months prior</td>
</tr>
<tr>
<td></td>
<td>Print/create signs</td>
<td>1 month prior</td>
</tr>
<tr>
<td></td>
<td>Ensure signage in place</td>
<td>Day before</td>
</tr>
<tr>
<td>Photo/video</td>
<td>Research and select photo/videographer</td>
<td>2 months prior</td>
</tr>
<tr>
<td></td>
<td>Contract</td>
<td>1 month prior</td>
</tr>
<tr>
<td></td>
<td>Meet at venue</td>
<td>2 weeks prior</td>
</tr>
<tr>
<td>Presenters</td>
<td>Identify with SC</td>
<td>3.5 months prior</td>
</tr>
<tr>
<td></td>
<td>Invite</td>
<td>3 months prior</td>
</tr>
<tr>
<td></td>
<td>Confirm</td>
<td>2 months prior</td>
</tr>
<tr>
<td></td>
<td>Finalize slides</td>
<td>1 month prior</td>
</tr>
<tr>
<td></td>
<td>Process travel reimbursement (as applicable)</td>
<td>2 weeks prior</td>
</tr>
<tr>
<td></td>
<td>Greet and welcome</td>
<td>1 hour before event</td>
</tr>
<tr>
<td>Promotion</td>
<td>Create marketing plan</td>
<td>3.5 months prior</td>
</tr>
<tr>
<td></td>
<td>Disseminate to NCATS and CLIC</td>
<td>3 months prior</td>
</tr>
<tr>
<td></td>
<td>Create and update website</td>
<td>Ongoing</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------------------------</td>
<td>---------</td>
</tr>
<tr>
<td><strong>Food / Beverages</strong></td>
<td>Research potential vendors</td>
<td>3-4</td>
</tr>
<tr>
<td></td>
<td>Contract</td>
<td>months</td>
</tr>
<tr>
<td></td>
<td>Confirm</td>
<td>prior</td>
</tr>
<tr>
<td></td>
<td>Pick up or delivery</td>
<td>1 month</td>
</tr>
<tr>
<td><strong>Briefing book</strong></td>
<td>Request info with registration</td>
<td>2-3</td>
</tr>
<tr>
<td></td>
<td>Create document</td>
<td>months</td>
</tr>
<tr>
<td></td>
<td>Print document</td>
<td>1 month</td>
</tr>
<tr>
<td><strong>Evaluation</strong></td>
<td>Create post event evaluation</td>
<td>2 months</td>
</tr>
<tr>
<td></td>
<td>Release results</td>
<td>prior</td>
</tr>
<tr>
<td></td>
<td>Longitudinal follow up</td>
<td>3 months</td>
</tr>
</tbody>
</table>

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

²An alternative to the hard copy briefing book could be creation of an app or website for all information.
D: Sample “Un-Agenda”

7:45 a.m. - Registration / breakfast / networking
8:30 a.m. - Welcome and opening remarks
   Martin Zand MD, PhD – Center for Leading Innovation and Collaboration (CLIC)
8:40 a.m. - Framing the issues - 4 slides x 4 minutes (4x4’s)
   • Michael Kurilla, MD, PhD, NCATS - Addressing the Opioid Epidemics Through Translational Science: The CTSA Program Role
   • Redonna Chandler, PhD, NIDA - The Opioid Crisis: When Evidence Based Interventions Fail to Reach Patients
   • Ken Leonard, PhD, University at Buffalo - The Elder Side of the Epidemic: High and Increasing Death Rates in Older Adults
   • Christian Thrasher, Clinton Foundation - Providing the Tools and Resources to Ensure Success with Long Term Recovery
9:00 a.m. – Idea generation & room topic discussion identification
9:45 a.m. - Morning breakout session 1
10:30 a.m. - Morning breakout session 2
11:30 a.m. - Lunch / networking
12:20 p.m. - Re-framing the issues - 4 slides x 4 minutes (4x4’s)
   • George Mashour, MD, PhD, University of Michigan - Reducing Opioid Prescribing and Enhancing Disposal: A Preventive Approach
   • Paul Dougherty, DC, DABCO, Canandaigua VA Medical Center - Whole Health Initiative, the Role of Patient Centered Non-pharmacological Pain Management
   • Michael Mendoza, MD, MPH, MS, FAAFP, Monroe County Health Department, University of Rochester - Responding to the Opioid Epidemic in Monroe County: A Cross-Sector Collaborative Approach
12:40 p.m. - Idea generation & room topic discussion identification
1:00 p.m. - Afternoon breakout session 1
1:45 p.m. – Afternoon breakout session 2
2:45 p.m. - Closing remarks

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

“Un-Meeting” to Address the Opioid Crisis through Translational Science Communications plan

Email Marketing: Steering Committee outreach – February 15
- Content
  - Planning/feedback questions
  - Meeting scheduling
- Audience: Steering Committee

Email Marketing: Save the Date – February 20
- Content
  - Include ad
  - Event details
- Audience: Hubs

Email Marketing: Registration reminders – March/April (ongoing)
- Content
  - Include details on registration process
  - Communicate through the site/email/newsletters
- Audience: Hubs

Targeted Emails: Nomination/travel award reminders – April (ongoing)
- Content
  - Include details on nomination/travel award process
  - Communicate through the site/email/newsletters
- Audience: Hubs

Calendar Updates: URMC Events Calendar – April 1
- Post to URMC Localist event calendar

Blog: Pre-event Blog Post – May 15
- Raise awareness and drive participation

Media: Local Media Outreach – June 2
- Share comprehensive media package day-of event

Blog: Post-event Blog Post – June 6
- Highlight key takeaways

Social Media: Twitter, Facebook, Instagram (as relevant)
- Content
  - Links to registration
  - Highlight theme
F: Logos and Branding

CTSA Clinical & Translational Science Awards Program

Color Palette Primary

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

- **Pantone 520C**
  - RGB: 103.46.107
  - CMYK: 68.95.27.14
  - #682E6B

- **NCATS Teal**
  - RGB: 0.100.120
  - CMYK: 92.49.40.15
  - #006478

- **Pantone Cool Gray 10C**
  - RGB: 101.101.106
  - CMYK: 61.53.48.19
  - #655569
### G: Budget Template

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

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

https://journals.plos.org/ploscompbiol/article?id=10.1371/journal.pcbi.1003905


https://www.academicradiology.org/article/S1076-6332(15)00450-X/abstract

www.Unconference.net