SPIE. STUDENT CHAPTERS

Event mastery:
A playbook for orchestrating impactful SPIE Student Chapter events
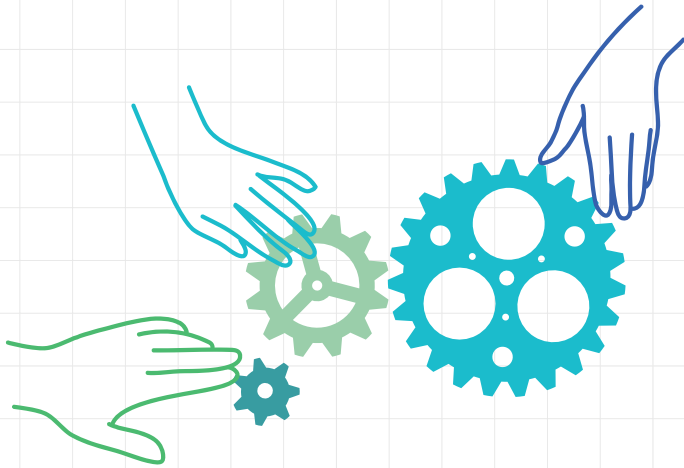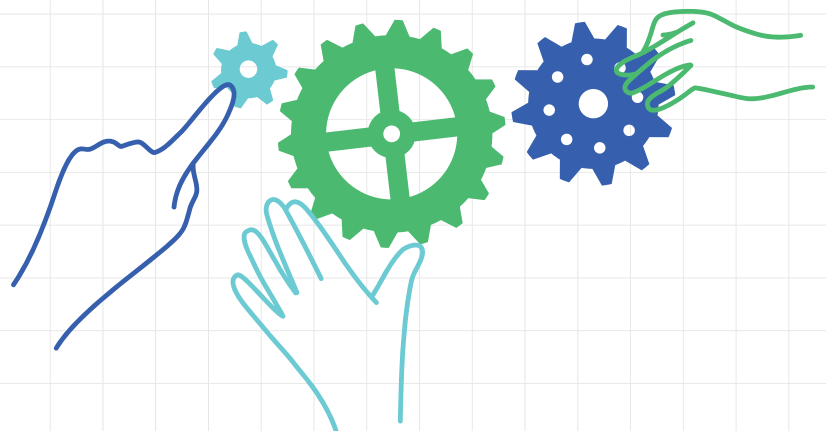
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Part I: Steps to take for a successful event

Overview of process

1 CREATE A PLAN
Set goals, define scope, strategize best timeframe, create timeline, make checklist

2 KEEP TRACK OF DETAILS
Create standardized planning and event feedback forms, set up online collaboration tools

3 SECURE EVENT FUNDING
Leverage SPIE, university, and industry funding

4 PROMOTE THE EVENT
Use strategic messaging on tailored platforms to spread the word to the intended audience

5 DELEGATE RESPONSIBILITIES
Build a full event team of passionate people focused on their areas of interest and expertise

6 COMPLETE EVENT WRAP-UP
Capture metrics, document data, and thank everyone involved!

Core to the mission of student chapters is event organization, from academic seminars, to outreach events, to fun social outings. Depending on the level of complexity of the event, or the level of experience of the chapter, this can be an intimidating process. This document compiles advice from chapter leaders who have gone before you, who have organized events from a handful of students to over 1,000 visitors, to help make your next event, whatever size it may be, a great success!

Getting Started

- At the beginning of your planning, lay out clear goals for the activity. Make sure you understand who your intended audience is, how you will reach them, and what they will gain from the event, as that will help you define the metrics for event success.

- Determine the event budget, which will help you set a realistic scope and determine if additional funding should be sought out (more on this later!).

- Once you are considering dates for the event, be aware of other events going on at your institution or in your neighboring community that might make it challenging for chapter members or other attendees to participate. For example, it is best to avoid major exam times like midterms or finals, and to be aware of university or community sporting events or celebrations that may draw large crowds away from your location. Work with your campus and department administrators to sort out viable timeframes.

- With an official event date decided, consider which activities will take the most time to complete and make a project timeline for important dates and deadlines.
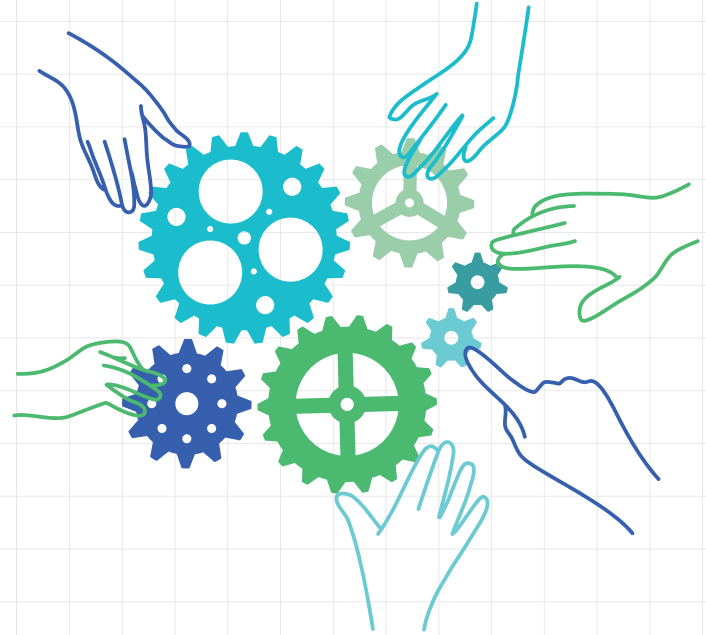
Keeping track of all the details

- Creating a standardized form for planning an event and collecting feedback (from both the event planners and attendees) afterwards can be a big help to making sure nothing is forgotten. This ensures you (and future chapter leaders) do not forget all the small things that make an event successful the next time your chapter hosts a similar event. For example, an event checklist could contain:

  ☐ Details of the event leadership structure

  ☐ If food is needed and where can you get it from

  ☐ What sort of space is required and how you book a room on campus

  *Note that many institutions require requests for room reservations and catering many months in advance, and many institutions have strict rules about using off-campus catering or food options. It is best to connect with your on- and off-campus partners early to learn their reservation procedures and rules.

- Having a standard form for collecting feedback after an event is also helpful, making sure you capture lessons learned, photos taken, receipts, and other details, making including all this information in your Annual Report a breeze.

- A variety of online collaboration tools can be very useful for storing these templates (as well as all your chapter documentation like budgets and meeting notes!) year after year.

  ◦ However, they are only helpful if you have a good process for how to use them. Online collaboration tools should not replace regular communication across the event team. Make sure the team is on-board with how they will be used and updates their assigned content regularly.

Securing event funding

- SPIE has several avenues for supporting events, from the Chapter Activity Grants to the Education and Outreach Grants. Make sure you take advantage of these opportunities and apply for funding that the grants will cover! Keep the deadlines for these grants on your chapter calendar and top of mind!

- Many universities have internal funding to support events. By seeking areas of alignment between your chapter's goals and your department's, you may find opportunitiesto use department funds to support your events. Your chapter advisor can help you accomplish this.

- Seek out additional partnerships from industry through institutional connections or through contacts you've made networking at SPIE conferences or events. The amount of money you need for your event may seem large to you, but may be trivial to a company's sponsorship budget. While the company is, of course, not obligated to get you anything, most company representatives are very friendly, and reaching out can help you build your network, even if you don't get any finances for your trouble.

- Keep in mind that the timing of when you want to run your event might not neatly line up with a nearby funding application deadline, so this is an area where thinking ahead really pays off. Being aware of all events you want to do for the rest of the year helps ensure you don't miss out on funding opportunities that close months before you actually need the money.

Promoting the event

- Start thinking early on about how you will get the word out. Is there a standard calendar for your department you can get the event placed on? What emails do other students pay attention to? Social media? Can you promote your event in relevant class lectures? Other campus clubs? (This could even include tangential departments!)

- Be sure to make your messaging clear as to who is invited and what value your event has to the attendee.

   ◦ Example promotional message: *"Are you a student interested in STEM but don't know what career path is best for you? Come listen to our panel of experts in optics and photonics talk about their career journeys and how these areas are rapidly growing fields. Attendance is free, as are the snacks!"*

   ◦ Example promotional message: *"Are you a grad student in optics and photonics and want to practice your conference presentation in a friendly, collaborative, and constructive environment? Join us for an evening of sharing and confidence building! Last Friday of every month in Room 203. Sign up here [QR Code]."*

## Delegating effectively to the rest of the chapter

- Not everything is the chapter president's job! In order to not get burned out and overwhelmed, share the burden with the other passionate students surrounding you. It will both ease the load on the chapter president and help develop a valuable leadership skill. Create opportunities to be involved for the whole chapter, not just the other officers.

- One of the most powerful tools in your hand as a leader is giving a sense of ownership to your team. Invite this sense of ownership through brainstorming in the early phases of event planning. Invite open-ended discussion, acknowledging the ideas of those who are excited about them, and assign tasks based on your people's passions and skills.

- Have clearly delineated roles for each volunteer, so everyone knows what is expected of them. This gives every person a chance to be proud of their individual contribution, and prevents things from dropping through the cracks since everyone is aware and accountable for each piece of the puzzle.

- Especially for larger events, utilize a full event team that includes responsibilities such as:

   ◦ Marketing, to spread the word both internally and externally, as is applicable for the event. This person/team likely also designs the event flyer, and helps to place it on event calendars.

   ◦ Event layout, working with the event space you have to best utilize it.

   ◦ Approvals, getting campus buildings unlocked on the weekend, getting permits to be in other building spaces, etc.

   ◦ Finances, since the event may require more effort and coordination than the treasurer can do alone.

   ◦ Day-of logistics, a point person for when things inevitably go wrong on the day of the event so volunteers know who to call.

   ◦ Photography, to document all the great things happening at the event and allow the other volunteers to focus on their roles.

   ◦ Volunteer coordinator, to ensure that students who signed up to participate know where to go and what to do.

Completing post-event follow up

- Remember that once the event is over, your work is not done! Have a plan to capture metrics that give you information about the successes, the challenges, learnings, audience, and how you can improve next time.

- Set yourself up for success by having a chapter member oversee event data capture.

- Remember to thank everyone involved, especially your volunteers! This can be face-to-face, a handwritten card, a small token of appreciation, or anything else that shows your gratitude.
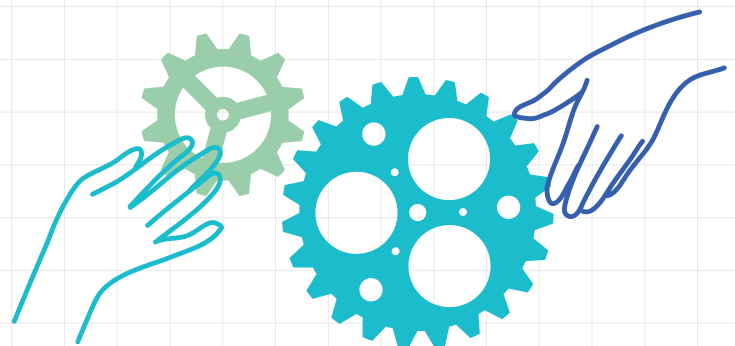
Part II: Event types and examples

SPIE Student Chapters are encouraged to engage in and organize the following four event types:

Industry engagement

- Includes activities with local optics and photonics industry or via zoom with industry worldwide.
- Tour local companies, or have representatives sit on a career panel.

Outreach

- This includes engagement of undergraduate students, other university students, and/or grade-school students into the study of optics and photonics fields.
- Social events:
  ◦ A welcome-back event after the start of the first semester to welcome back returning students and give incoming students a chance to meet the chapter all at once.
  ◦ Opportunities for students to gather near holidays, especially meaningful for students who may not have a chance to travel back home for that holiday.
- Visit a nearby school with optics demos to show younger students how cool optics is.
  ◦ Connect with a teacher to see if your group can come present to their classroom or set up a booth at a career fair event. Many teachers would be excited to have you! SPIE also has a list of easy optics demos you can do with younger students here on our website.
- Invite the community to come to your campus and set up a variety of demonstrations of optical principles for them to see. These events at some universities have risen to over 1,000 people in attendance, since many people like a free, well-run science event for their kids.

Professional development

- Host workshops to prepare for future careers on topics such as presenting your research, overcoming imposter syndrome, interviewing skills, and more!
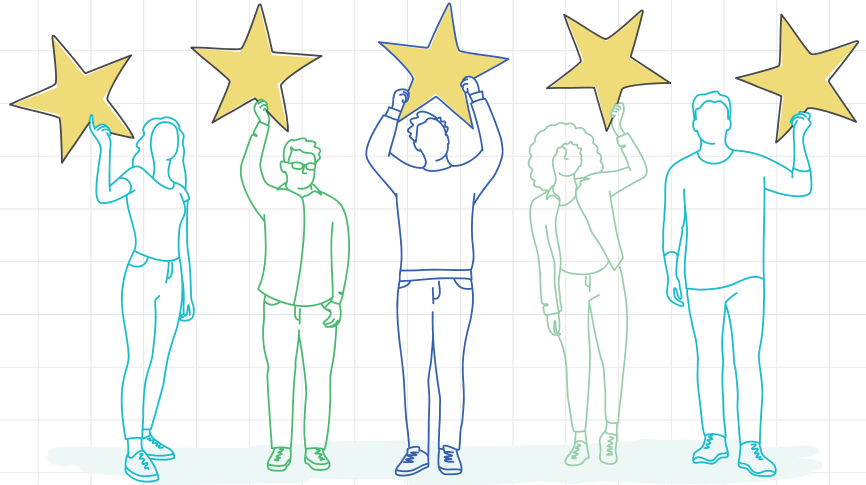
Technical education

- Host an academic course or session to add technical data or skills outside the typical university curriculum to complement what your university already offers.
  ◦ Example: A regularly scheduled seminar to give students an opportunity to share their research or other skills with other students. This can also serve as the general meeting for the chapter, helping chapter leaders to disseminate information in person to chapter members. It never hurts to have food at these events to draw a crowd!
  ◦ Example: Workshops on specific skills students may wish to learn, such as an hour-long intro to python programming, or a lens design software intro, or a short course on how to apply for scholarships.
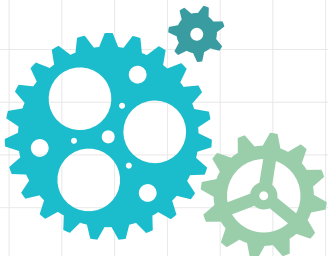
Part III: Achieving recognition for your event prowess — SPIE Presidential Award for Outstanding Student Chapter and illustrative case study

To truly make an impact in your local optics and photonics community, your chapter has the opportunity to take your events to the next level. Student chapters that demonstrate an exceptional level of participation, enthusiasm, program quality, professionalism, and involvement in their institution, the local community, and the SPIE community have the opportunity to be considered for the SPIE Presidential Award for Outstanding Student Chapter.

- Finalist selection is based on your Annual Reports. SPIE looks for chapters who have placed emphasis on robust outreach to undergraduate students, community service, increased technical education efforts, and developing a healthy chapter community.

- The top three Chapters for this Award receive a monetary prize

- The first place winners are also invited to select representatives from their chapter, along with their faculty advisor, to attend SPIE Optics + Photonics in San Diego, California, in August each year to receive their award on stage at the Annual Society Awards Banquet celebration.

The 2024 SPIE Presidential Award for Outstanding Student Chapter went to the University of Guanajuato Chapter. They have 38 Student Members, and here are a few examples from their Annual Report on the frequency and types of events they ran. This is not what your chapter has to do; it only serves as an example of what a top performing chapter looks like.

What they did:

- Held Chapter meetings in
  - January
  - May
  - August
  - September
  - October
  - November

- Held one industry engagement activity where they visited a local research institute.

- Held 14 outreach events, including organizing a lab visit for local high school students, a photography contest, International Day of Light celebrations, and a booth at several local math and science fairs.

- Held eight professional development events, including attending "The Art of Public Speaking" workshop during a conference, hosting a basic/intermediate English-speaking workshop, and a series of "Coffee Science" events with different invited guest speakers.

- Held seven technical education events, including a technical talk on ¨Plasmonic Sensors: Concepts and Applications¨ as a part of OPA (Optics and Photonics for Applications) 2023 Conference; poster sessions; and workshops on computational photonics, machine learning and latex coding for undergraduate students.