

## Checklist for TC local hosts

The FIRST community is member driven, and we appreciate members that would like to contribute. Thank you for considering hosting a TC!

TCs are very important part of the CSIRT community and team development. They enable teams and individuals to exchange the latest information about the current events. A TC can be the best place to meet peers and get ideas on how to solve problems host organizations might be experiencing and learn about tools that help solve them. The benefit for the local host is that TCs provides an opportunity to show peers capabilities that you have developed and is a fantastic opportunity to give back to the community. It is also an opportunity for local hosts to build their network and share their own lessons learned in the spirit of cooperation.

While the expectation is that the host will organize the event, know you are not alone. **Please contact the FIRST Secretariat, [first-sec@first.org](mailto:first-sec@first.org) with any questions.** FIRST encourages potential local hosts to contact FIRST Secretariat at least 20-24 weeks prior to the event date, regardless of whether the details of the event are ready or not.

Hosting a TC is rewarding but it is also can be demanding. Depending on the exact plans along with logistical and organization capabilities, organizing a TC can take anywhere from one to three days a week from the start until the end. FIRST will help along the way but the local host will have to do the largest part of the work.

When planning the TC the host must take into account criteria for site selection from the <https://first.org/about/policies/event-site-selection>. The exception is catering which is optional for TCs.

Please try to avoid conflicts with other FIRST events or industry events in the same region.

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## TC format and logistics

The following information describes the most typical scenario. This description is not a requirement but a template that local host can use to model its own TC.

A TC is usually a single-track event (plenary) spanning one or two days. Meaning, all attendees listen to the same talks in the same room. This single track can consist of: talks, demonstrations, workshops, discussions or any mixture of thereof.

Duration of each presentation is usually 20-45 minutes in length. Shorter (e.g. 10 – 15 minutes) and longer (1 – 2 hours) talks are also possible. Shorter talks must take into account time needed for presenters to switch. Very short presentations (<10 minutes) are not recommended as too much time is lost on presenter switching.

The usual format of a day is as follows:

08:00 – 09:15 Registration  
09:15 – 09:30 Local host welcome address  
09:30 – 10:30 Session 1  
10:30 – 11:30 Session 2  
11:30 – 12:00 Break  
12:00 – 13:00 Session 3  
13:00 – 14:00 Lunch  
14:00 – 15:00 Session 4  
15:00 – 15:30 Break  
15:30 – 16:30 Session 5  
16:30 – 17:30 Session 6

One hour of the session is divided like this: 45 minutes presentation, 10 minutes Q&A and 5 minutes presenters switch and bio-break. Please note, some hosts follow other formats such as a 10 minute break following each presentation – so feel free to follow any format that allows for enough Q&A as well as networking subject to your start/end times.

Training may be added (half day or full day sessions held in a classroom setting in smaller groups of 15-25 participants). If training is planned, then this must be mentioned in the initial proposal together with information what type of training and if FIRST needs to provide trainers or the material.

## FIRST Responsibilities

FIRST will promote the TC of [www.first.org](http://www.first.org) web site. Furthermore, FIRST can assist with:

1. Communications to the Teams list about the event and for the Call for Papers (Speakers)
2. Website/Registration Form
3. Training

## Summary of Host Responsibilities

### Call for Presentations

TC hosts are responsible for the event program. This includes drafting a Call for Papers (Presenters), managing the responses (accept/reject notifications), and submitting the final event program for publication.

There may be a suggested a theme for the event – or suggested topics if it is planned to have a topic- or industry-specific TC.

### Venue size and requirement

TC can attract 30 – 100 attendees, sometimes more. The meeting room(s) must be able to accommodate that number or have the registration limit clearly communicated.

If there is a rental fee consider charging an attendance fee, or getting a sponsor for the event. For logistical reasons, hosts also wishing to make the event free to attendees may consider a “no show” fee in order to “right size” the event.

Speakers must be able to use microphones and project material from a laptop. Ideally, presenters should be able to use their personal laptops but using a computer provided the host is satisfactory.

There must be sufficient power supply for attendees, access to Internet should be unimpeded (no filtering, proxy, interception) and adequate bandwidth available. It should be anticipated that each attendee would have, at least, two devices.

Other venue considerations:

- Please provide a Google map for the event website including directions using public transportation.
- Make sure there is adequate signage at the venue if the location of the room is not easily found
- If attendees are required to have ID to check-in or there are other venue security requirements, please note on website and in an email reminder to participants prior to the event.

## Accommodations

The host is not required to reserve rooms or arrange special discounts with hotel for attendees. It is sufficient to list one, ideally a few, reasonably priced hotels nearby (walkable within 10-15 minutes or easily accessed with public transportation.) Generally, attendees will organize their own accommodation. The host should provide transport if the closest hotel is more than a 20-30-minute walk or when the public transport is absent and must provide instructions how to use public transport if such is the suggested method to commute between the hotel and the meeting venue.

If there is a special booking process or code for the recommended hotel, please notify first-sec so they can update the web site.

## Food, drinks and entertainment

Having a social event at the end of the day (e.g. group dinner or other activity) is optional. FIRST does not expect that local host organize a social event so this is left to the local host discretion. A dinner or reception could be sponsored, or paid for by the attendees.

Serving refreshment (e.g. coffee, juice, tea, soft drinks) and finger food (e.g. biscuits, pastries) during breaks is optional. Providing drinking water for attendees during the breaks is mandatory – coffee/tea service is recommended.

Serving and consuming alcoholic drinks throughout the day is prohibited. Failure to adhere to this will result losing the right to use FIRST logo and brand for the event. Serving and consuming alcoholic drinks during social events is permitted as far as FIRST is concerned.

Serving food (hot or cold) for lunch is optional. If there is no registration fee, it is OK to have the attendees go to lunch on their own. TCs charging a registration fee are encouraged to provide lunch inclusive in registration fee.

If local host is not providing food then a sufficient number of places where attendees can purchase food must be available within the walking distance. Walking distance, in this case, is about 5 minutes normal walk in one direction. Additional requirement is that places serve, at least, vegetarian meals. Ideally, attendees should be able to purchase food that complies with various religious guidelines and, at least, gluten free.

If the host is providing food then it must either write ingredient of each dish or notify attendees that no care was taken on what ingredients are in the dish. Whichever option is chosen attendees with allergy concerns will know what will be safe to eat.

Information about food and drinks must be presented at the TC web page.

## Sponsorship

If you intend to offer sponsorships, please work with the FIRST Secretariat to make sure your offers are in line with our other event opportunities. Preferred TC Sponsorships are in-kind (paid directly by the sponsor) and all sponsors should be recognized/thanked accordingly. Sponsored or paid speaking slots are strictly prohibited and attendee contact information should never be shared by the organizers unless they specifically opt in.

## Event Policies

Please make sure all participants are aware of the following:

1. [FIRST Code of Conduct](#)
2. FIRST Photography Policy (Draft TBD)
3. Emergency Exit / Response for the Venue

## Suggested Timeline

Depending on the circumstance, it may be necessary to start planning earlier or the timeline may be compressed. If the host does not have extensive experience in organizing such events we would strongly recommend that actions happen within the suggested time limits.

Typically the earlier in advance the planning starts and the more extensive it is, the higher the likelihood of a successful TC.

### 24-26 weeks out

- Host should express its willingness to organize a TC to [first-sec@first.org](mailto:first-sec@first.org)
- Information that must be provided to FIRST is:
  - Potential dates
  - Location
  - Minimum and maximum of attendees
  - Theme or topic(s)
  - Is the TC open to everyone or for FIRST members and guests only

### 20-23 weeks out

- FIRST confirms selected dates; or
- negotiation starts to select the dates
- start selection of the program committee

### 16-19 weeks out

- Host should provide basic website information to build an event and registration page
  - A primary contact(s) for an email alias
  - Confirmed dates
  - Venue address and map
  - Travel Information Tips (taxi vs. public transportation from airport, VISA requirements)
  - Hotel Information
  - Area Information (Currency, Electricity, Points of Interest)
  - Program/Agenda - can be updated as speakers/topics are confirmed
  - Registration fees and/or sponsorship opportunities
  - Social Event details and cost if this is organized
  - Host/Sponsor logos and links (will be updated as sponsors are identified)
- Hold a preliminary call/meeting with the program committee
- Issue Call for Papers with at least 3-4 weeks response time
- Reach out to contacts to make individual program invitations
- Open registration
- Solicit Sponsors (optional)

### 8-12 weeks out

- Notify speakers (and those not selected)
- Confirm and publish the TC program
- Send registration reminder

#### 2-4 weeks out

- Send attendees a final confirmation and reminder with any important information (ask for cancellations if no longer planning to attend and invite wait listed attendees)
- Finalize volunteers and onsite staffing and communications
- Request presentations from speakers

#### 1+ week out

- Final Food & Beverage Orders
- Print event program and signage
- Print badges and registration lists
- Print certificates (if applicable)
- Prepare opening and closing remarks

#### Event Day

- Registration
  - Host should provide onsite Check-In Staff
  - Registration List and Badges
  - Any security requirements (notify if IDs are required)
  - Programs/Agendas
  - Certificates of Participation (for those that require this)
- Deliver welcome speech
- Mention and thank sponsors (if there are sponsors)
- Remind attendees to fill the feedback forms
- Relax and try to enjoy the event

#### 1-2 weeks following event

- Issue an evaluation for feedback
- Summarize event for first-sec@first.org (general feedback and no show list). Note anything which should be changed or done differently – this is valuable feedback to help other TC hosts.
- Collect any presentations that speakers are willing to post on the website.

## Overview Checklist

Items in *italics* are mandatory.

### Program

- ☑ Select a Program Chair and Committee that will assist in planning the event.
- ☑ Hold a preliminary call/meeting with PC to review all event requirements and suggested timeline.
- ☑ *Notify the FIRST Secretariat (first-sec@first.org) with suggested date/location to check for conflicts*

### Date and Location

- ☑ *Confirm a date and a venue/location*
- ☑ *Note the maximum number of attendees and close the registrations accordingly to open a wait list.*
- ☑ *The venue must have wifi access and electrical outlets (power cords).*

### Format

- ☑ FIRST may be able to provide a trainer and/or training content as an add-on to plenary sessions; please email first-sec for details

### Call for Presentations

- ☑ *Drafting a Call for Papers (Presenters)*
- ☑ *Managing the responses (accept/reject notifications)*
- ☑ *Submit the final event program for publication*
- ☑ Suggest a theme for the event or suggested topics if a topic- or industry-specific TC is planned

### Accommodation

- ☑ *Provide a few reasonably priced hotels close to the venue, or close to public transportation.*
- ☑ If there is a special booking process or code for the recommended hotel, notify first-sec to update the web site.

### Food & Beverage

- ☑ *Host should minimally provide 1-2 breaks for attendees each day.* Lunch is optional, Coffee/tea is recommended but *water is mandatory.*

### Attendees

- ☑ *Decide if registration is closed (FIRST members only) or open.*
- ☑ Organizers may wish to charge a “no-show” fee to assist in proper event resource planning and mitigate issues with people registering for a free event because there are no penalties. FIRST can assist with invoicing no show attendees; please contact first-sec for more information.

### Onsite Registration & Materials

- ☑ Provide onsite Check-In Staff
- ☑ *Registration List and Badges*
- ☑ Identify any security requirements (notify if IDs are required)
- ☑ *Provide printed or electronic Programs/Agendas*
- ☑ Certificates of Participation
- ☑ Adequate signage



## **Policies**

- ☒ Determine default TLP of presentations, and communicate
- ☒ Determine policy about photos, and communicate
- ☒ Determine policy about publication of presentations, hosting location (if necessary,) and communicate

## **FIRST will need the following information for the website:**

- ☒ A primary contact(s) for an email alias
- ☒ Confirmed dates
- ☒ Venue address and map
- ☒ Travel Information Tips (taxi vs. public transportation from airport, VISA requirements)
- ☒ Hotel Information (see Accommodation)
- ☒ Area Information (Currency, Electricity, Points of Interest)
- ☒ Program/Agenda - can be updated as speakers/topics are confirmed
- ☒ Registration fees and/or sponsorship opportunities
- ☒ Social Event details and cost if this is organized
- ☒ Host/Sponsor logos and links

The local host is welcome to invite sponsors to cut the costs.