Guidelines for Site Selection for all FIRST events

Revision history

Version	Date	Author(s)	Comments
0.1	2016-Oct-20	Gaus	Initial draft
0.2	2016-Nov-14	Gaus	Incorporated comments from the Board
0.3	2016-Oct-20	Gaus	Cleanup, formatting and text clarification

Introduction

The following text was inspired by "IAOC Plenary Meeting Venue Selection Process" draft document.

This document describes principles guiding FIRST Board when selecting a site for an event. These principles guide site selection of all events and not only the Annual Conference. This also includes events organized by FIRST members but under the FIRST banner.

Guidelines provided in this document are not binding. The FIRST Board, after considering facts, may decide to act contrary to some of the guidelines presented here if there is a sufficient good reason for such decision.

One of goals for a face-to-face event is for attendees to have a good event experience. That includes, among others, the following elements: safety, attaining knowledge, consistency of experience across events and opportunity to interact with other attendees.

Despite being one of the goals FIRST cannot do is to guarantee that each and every attendee will have trouble-free event and individual experience may differ depending on circumstances. This is especially true when attendees interact directly with the local populace outside of the confines of the event venue or issues related to transport to and from the site.

Within this document the term "region" is used to loosely denote a geographic region (but not necessarily always). Some examples of a "region" are: Asia-Pacific (typically most of East Asia, South Asia, Southeast Asia, and Oceania), South America (the whole continent), European Union

(countries members of EU and potentially some non-EU countries like United Kingdom or Norway) and Middle East (region centered on Western Asia and Egypt).

Lastly, being guidelines, this document will never be complete. The FIRST Board will re-examine guidelines periodically but no later than every four years.

Event selection

Goals of face-to-face events

The FIRST community is based on trust and while it is possible to develop trusting relationship remotely, it is much easier and quicker to create and deepen trust when meeting in person.

Impromptu meetings, during face-to-face events, of experts who normally may not be in touch can result in developing new ideas, tools and methods.

Selection of a location

A location for an event is chosen in accordance with the mission of FIRST and to fulfil the event's goals. Minimizing travel and ease of travel for participants is also considered during the selection process.

Attending an event will inevitably force some attendees to travel. Depending on the nature of an event locations are varied or keep unchanged within a region.

By varying location of a general event FIRST is trying to minimize travel for attendees from a chosen region and engage local teams in participating. At the same time a specialized event (e.g. vendors' PSIRT) can be held at the same location or region because the majority of participants are situated there.

Part of FIRST mission is to promote the creation of CSIRTs and raising awareness so a location of an event can be in a region where only a few FIRST members are situated. While this will force majority of attendees to travel, FIRST considers this as a strategic investment in a global community. Bringing experts to such location will influence the current situation at the selected city, country or region.

The FIRST Annual Conference currently moves between Asia, Europe and North America but this is not a strict requirement. The Annual Conference can be held in the same region multiple times in a row.

Timing of an event

Theoretically an event can be held at any time but in practice choosing when an event will be organized is subject to the following constraints:

- The event does not overlaps with another event(s) that a good portion of FIRST members could be interested in attending (e.g. BlackHat, RSA, DefCon, ...).

- The event do not overlaps with another FIRST organized event. This overlap can be either geographical or thematic (e.g. two energy-related events).

- Avoid major national, regional or religious holidays.

If an event is a recurring the select date should be retained (varying the date for 2-3 weeks on either side is well within tolerance) if possible and/or practical. This helps attendees to plan their participation in advance.

Politics of site selection

By selecting a particular site FIRST is not expressing any statement (implied or otherwise) about governing structure of the host country, their beliefs, economic status or laws.

The same is true if FIRST does not select a particular site for an event. By not selecting a site (that might be proposed by a member team) FIRST is not expressing any statements.

A site is selected solely based on perceived benefits that an event held at the selected site and at the given time can bring to the FIRST members.

Timeline of selection process

Some of the events are planned one or more years in advance. The Board is trying to establish a procedure where all larger or significant events are planned two to three years in advance. Planning events more than three years in advance is generally very impractical as many properties (i.e. hotels, conference centers) will not allow booking that much in advance.

As a guide, event planning is done on the following scale:

- Annual Conference is planned three years in advance.

- Symposium is planned one to two years in advance.

- Technical Colloquia six months to one year in advance.

Generally, larger events that require more resources are planned longer in advance. That is not representation of significance of an event but simply reflect logistics demands and time needed to accomplish them.

Such long term planning helps with financial planning, keeping cost under control and enables teams to plan their attendance and travel budget.

Long term planning – consequences

The downside of long term planning is potential that a situation at the selected event site can dramatically change in the intervening period. FIRST Board is keeping itself informed about the current situation but it is not always easy to predict how things would develop in a year or two.

All decisions are made based on the currently available information and (more or less) educated guesses how things may develop. Some of the guesses are relatively easy (e.g. if an open warfare is happening now it is likely that the situation will be volatile in the coming year too) but others are not (e.g. the outbreak of a diseases like SARS in 2003).

For that reason FIRST Board monitors the situation for all selected sites and periodically evaluates if they are still viable for the event.

If it is decided that a site is no longer viable, FIRST can either move the event to a different location or cancel the event.

Selecting a specific hotel chain

FIRST avoids establishing a long term contract with a particular hotel chain. Such a long term relationship could keep the overall price of events under better control but it would limit the freedom to strategically host an event at a desired location.

For example, FIRST has a contract with a BestHotel chain to host next three Annual Conferences in its hotels. This will prevent FIRST from moving a conference to the Pacific Island region (as a strategic investment) because the BestHotel does not have a property there. FIRST would have to wait until the contract is finished to move the Conference to Pacific Island region.

Mandatory criteria for site selection

The following items are of primary concern when considering a site for an event. If they are not satisfied FIRST will not select that site for an event.

Safety and security

The site must be deemed reasonably safe for all attendees irrespectively of their gender, beliefs, race, age or any other attribute. This mainly includes physical security at the event venue, transport to and from the venue (normally to the closest international airport) and any additional venue (including transportation) that will be used for FIRST organized or sponsored activities (e.g. gala dinner if held at a different location).

The assessment is based from a standpoint of a "regular" attendee and not from the "high value target" perspective. Attendees who are high value targets (e.g. due to a position in their organization or other reasons) must make their own security assessment and take additional measures if required.

FIRST security assessment does not include areas outside of the confines of a venue nor any other activities organized by attendees.

Health concerns

The select site will not expose attendees to life threatening illnesses and diseases.

Each site and region carries some health risks and every person traveling outside country of residence should follow the advice given by their local health authority or medical doctor.

Under exceptional circumstances FIRST may provide health guidelines related to a specific event site. In such cases FIRST can provide links to the information published by organizations like World Health Organization (WHO) or Center for Disease Control and Prevention (CDC). This does

not frees attendees from performing their due diligence and seeking medical advice relevant to their situation.

Event space requirements

The event venue must be able to physically and safely accommodate expected number of attendees in the planned format (e.g. one or more parallel sessions).

In practice this means positive answers for the following questions:

- Can we accommodate the estimated number of attendees in the premise without breaching maximum occupancy limit?
- Do we have sufficient number of rooms of a sufficient seating capacity for the intended purpose of the meeting?
- Presence of one or more nearby hotels that can accept the estimated number of attendees?

These requirements would differ between classes of events but could also vary within the same class. For example, one Symposium can have two parallel tracks of talks but another has only one or four.

In rare cases the number of attendees can be significantly higher than envisaged. If that would happen the number of attendees will be capped when the limits of the venue are reached.

Single meeting venue

All activities (sessions, trainings etc.) must happen within a single building or physically connected buildings.

Catering

The venue must provide food and beverage suitable for international attendees with varied dietary requirements. This includes, but not limited to: vegetarian, food allergies and religious restrictions.

Access for people with disabilities

Both hotel and the meeting venue must be accessible to people with disabilities.

Important criteria for site selection

The following items are significant but are not mandatory.

During the selection process FIRST Board is trying to satisfy as many of them as possible but a simple number of satisfied criteria is not a guarantee of the site being selected. For example, site A would not automatically be selected only because it satisfies three criteria and site B only two.

Additionally, the relative weight of criterion can vary even between two events of the same class (e.g. two symposia) depending on the additional goals the event needs to fulfil.

Price

FIRST is fiscally responsible organization and is also aware that our members have varied financial situation. The venue must be deemed acceptable to majority of potential attendees and, where and when possible, a choice of accommodations should be available.

Hosting an event at the cheapest possible venue will have equally large impact on the event as it would have if the event is hosted at the very expensive venue. And both of these impacts would be negative.

Location

Some locations have a reputation of and are considered as a typical (sometimes exotic) holiday locations. While there are perfectly legitimate reasons to have a meeting at these locations some attendees may have difficulties justifying such travel destination to their managers. Such typical holiday destinations should undergo additional scrutiny before being accepted as an event venue.

Local host

Presence of a strong local host that can support local activities, such as visa issuance, site selection and on-the-ground support to our event organizer is very helpful.

FIRST has put in place a structure that allows us to organize an event at any location irrespectively if local host exists or not but having a strong local host can greatly increase the overall event experience.

Infrastructure

Each event has certain technical requirements the main one being unfettered Internet connectivity. That includes WiFi within the meeting venue and hotel and sufficient bandwidth.

Additional requirements are video projectors, microphones, recording equipment, storage, computers, networking equipment and anything else that is needed for the event. The exact requirements would depend on the type of the event and session(s) that would happen at the event.

Visa requirement

The site must not have overly stringent and complicated visa requirements that would prevent majority of expected attendees to travel to the chosen site.

Travel

The site should have an international hub airport locally or within easy reach.

Depending on the type of an event this criteria can be relaxed so that international reachability is of secondary importance. For example an event that is meant to attract predominantly local

attendees (e.g. from within a country) does not have to have an international airport but only a good local connectivity.

Cancelling an event

As noted earlier, events are planned as much in advance as possible which, in some instances up to three years in advance. A situation at the selected location can change drastically during these three years so the Board monitors the situation at the selected location and the region. The purpose of this monitoring is to establish if the location still satisfies mandatory requirements. If mandatory requirements are not satisfied any more the Board may decide to either cancel the event or to move it to another location.

Generally, FIRST does not selects a backup location for each event or have a 'catch-all' backup location. Having a backup location would be a costly option and, up until the moment this document was produced, only a single event had to be cancelled (Dhaka in 2016). For that reason maintaining a backup location is not considered a requirement.

For the purpose of cancelling an event the main focus is on "health concerns" and "safety and security" requirements. The Board considers, among others, the following when deciding viability of the location:

- Armed conflict, terrorist attacks or similar events.
- Violent protests and unrests.
- Natural disasters (e.g. fire, flood, tsunami etc.).
- Life threatening diseases at the location and/or region.
- Epidemic (e.g. SARS) or outbreak (e.g. Ebola).

The situation is monitored for a city where the event is to take place but also for the country and the region. In the case of epidemic the scope is even wider as it can adversely impact travel.

To guide the decision making process the Board is using public information sources like news feeds, national health authority advisories, trip advices (usually) given by national foreign office/ministry and closed/private information sources.

References

[1] S. Trewin, "Accessible Conference Guide | SIGACCESS." .
[2] R. Pelletier, "IETF Plenary Meeting Venue Selection Process -- draft 03," IETF, draft-ietf-mtgvenue-iaoc-venue-selection-process-03, Nov. 2016.
[3] ISO, "SD 27 – Benefits of Hosting SC 27 Meetings." ISO/IEC, Jun-2016.