

Hosting Policy for the Biennial Northern Hardwood Conference, version 2

NHC2023 Biennial Meeting Development Committee^{1*}

BACKGROUND

The northern hardwood type occupies millions of acres of forest land in the eastern United States and Canada, representing one of the most economically important and ecologically diverse forests in eastern North America. Northern hardwood silviculture is diverse and complex and has been the focus of extensive research for over 80 years. Today, managers continue to seek innovative sustainable management solutions to address the expanding challenges facing this forest type, including serious threats such as invasive species, inadequate tree regeneration and shifts in composition, herbivory, climate change, nitrogen deposition, and forest fragmentation. A large-scale conference to discuss and summarize the current science and management of northern hardwood forests has not been held since the 1980s. Over 2018-2021, a diverse group of research and management professionals developed a repeating conference concept to learn, share, and discuss cutting edge science and innovative management practices to sustain healthy and productive northern hardwood forests now and into the future.

VISION

The Northern Hardwood Conference will be...

- An engaging and re-occurring biennial event where participants learn, share, and discuss ideas to sustain forest uses and values now and into the future.
- An event with an applied management and silviculture emphasis.
- An inclusive, welcoming event to all interested in the current and future status of northern hardwood forests.
- A go-to event where cutting-edge science and innovative management practices/uses are exchanged.
- A responsive event that highlights urgent needs in northern hardwood forest ecology and management.

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**Version 2 was drafted and approved by the NHC 2023 Biennial Meeting Development Committee, which consisted of members from the Lake States U.S. (Christel Kern, Greg Edge, Mike Walters, Chris Webster), Northeast U.S. (Tony D'Amato, Laura Kenefic, Peter Smallidge, Kevin Evans), and Southeastern Canada (Storm Robinson, Steve Bedard, Frederik Doyon, Trevor Jones).*

GOALS

The Northern Hardwood Conferences will...

- Foster relationships among research/academia/management/industry/conservation sectors
- Present science syntheses and latest findings
- Showcase conventional and alternative management practices
- Keep abreast on trends, issues, and opportunities in the products industry
- Identify knowledge gaps and future research needs

MISSION

Host geographically-rotating, biennial Northern Hardwood Conferences to facilitate knowledge exchange and showcase applications and uses of northern hardwoods first-hand by various organizations and regions.

HOSTING POLICY

To maintain the vision, goals, and mission of the Northern Hardwood Conference (NHC), a hosting policy was originally created by the Biennial Meeting Development Committee in 2020-21. The policy will aid host organizations to plan and interested organizations decide if hosting is a possibility. The hosting policy will also aid in selection of location if multiple locations are put forth for the same conference year (App. A).

Hosting Principles

These fundamental principles will serve as guides for identifying and determining the conference location and host organization for NHC:

1. Since the primary function of NHC is to serve the full range of the northern hardwood forest type, the conference location will rotate biennially between Canada, Lake States U.S., and northeastern U.S to allow for full participation and reduced travel for each region to participate in-person every few years. The rotation pattern among the three regions can vary over time to meet the other hosting principles, but, on average, will rotate equally among regions to “cross-pollinate” knowledge and practice.
2. The hosting organization(s) will:
 - Have one or more people dedicated to being conference chair during the 2+ years of conference planning.
 - Have potential resources to initiate planning (e.g., staffing, sponsorship, synergy, ...).
 - Will plan conference logistics, either through the host organization or other conference planning service (note - efficiencies may be gained by using the same firm as the previous host).

- Disseminate evaluation surveys to participants and share results with the next conference's host.
- Archive and document the information exchanged at meetings through proceedings, journal special issues, and other formats (host decides on best format(s)).
- Target registration to approximately or no greater than 350USD/465CAD by leveraging expenses (e.g., facility fees) with sponsorships (and other grants, in-kind, etc.) to reduce costs to participants. The overall goal is to keep the conference as affordable as possible for potential participants.
- Maintaining a mixed format of 2 meeting days and 1 field day - mixed format is essential but the length and order may be influenced by the experiences at previous conferences and by host.
- Aim for hybrid in-person and virtual options to encourage as much participation as possible across the northern hardwood range.
- Give funds remaining after conference expenses are paid (if available) to the next conference host to be used as student travel scholarships or as 'startup funds' to fulfill initial financial obligations to engage in contracts to reserve conference facilities and services (e.g., food, transportation).
- Share planning documentation and lessons learned with the next conference host.
- Announce the next host, year, and location on the current conference website and at the meeting.

3. Because the NHC is focused on exchanging knowledge and showcasing practice, the hosting location will aim for an in-person conference with these criteria.

- The conference facility
 - can hold ~300 people.
 - has floor layout for concurrent sessions, posters, exhibitors, and other meeting formats as needed.
 - is convenient to amenities, such as lodging, food service, and airport.
- The nearby airport is mid-sized or larger in terms of number of airlines and flight options.
- The field sites are <2 hours from conference facility for tours. (Optional pre- and post-conference tours/training can be arranged by host for sites further away.)
- Selected dates should avoid overlapping with other major conferences that are of interest for the NH forest science and management community.

4. Virtual options are encouraged to increase participation for those with travel restrictions.

5. Follow best practices for Diversity, Equity, and Inclusion (DEI) and accessibility to create a welcoming, inclusive culture. Assign a committee member to DEI to ensure these values are upheld in planning and during the conference. To the degree possible, set a gender balanced agenda with representation from multiple regions and disciplines, inclusion of indigenous people beyond ceremonies, and provide opportunities for early career professionals/scientists. See DEI tips [HERE](#) for more best practices related to conference planning.

6. The hosting policy should be reviewed and updated after each conference. The reviewers should include representatives from each region and the conference chair(s) of the most recent NHC. Decisions should be made by majority rules and, as needed, by informed leader(s) (i.e. conference chair(s)).

Hosting Schedule

Based on the above principles, NHC historic and upcoming schedule is as follows:

| <u>Year</u> | <u>Country</u> | <u>Province/State</u> | <u>City</u> | <u>Host Organization(s)</u> |
|-------------|----------------|-----------------------|-------------------|-----------------------------|
| 2021 | USA | WI | Green Bay/Virtual | USDA FS NRS & WI DNR |
| 2023 | Canada | NB | Fredericton | NHRI & UNB |
| 2025 | USA | NY | Syracuse | SUNY-ESF |
| 2027 | | | | |

Appendix A. NHC2025 Example Evaluation rubric for host proposals.

| NHC2025 Host Evaluation Rubric | | | |
|--|---|--|---------------|
| Biennial Meeting Development Committee | | | |
| 11/7/2023 | | | |
| PROCESS | | | |
| Candidate host locations submit a 2-page proposal with criteria in mind to christel.c.kern@usda.gov. | | | |
| Reviewers interpret proposal within the framework of the host policy | | | |
| Reviewers score proposal with the following rubric | | | |
| EVALUATION RUBRIC | | | |
| AREA OF INTEREST | RATING CRITERIA | RATING SCALE | RATING |
| Candidate Host | Conference Chair(s) | <i>n/a</i> | |
| | Organizing Institutions | <i>n/a</i> | |
| | Location (City, State/Province) | <i>n/a</i> | |
| Cross-pollination | Host region is different than current meeting? | <i>Yes=Continue to next criteria, No=Reject proposal</i> | |
| Leadership | Willing leader(s)/chair(s) named? | <i>Yes=Continue to next criteria, No=Reject proposal</i> | |
| Resources (10 points max.) | Resources (staffing, partners, conference planning, ...) are likely | <i>1-5; 1=disagree, 5=agree</i> | |
| | Budget narrative suggests that cost of facility and potential sponsors, grants, in-kind, etc. will likely be leveraged to keep participant registration to \$350 USD/\$465 CAD or less (<i>Will allow for inflation 5-8%</i>) | <i>1-5; 1=disagree, 5=agree</i> | |
| Logistics (10 points max.) | <u>Airport service</u> is mid-sized or larger in terms of number of airlines and flights or equivalent costs/accessibility explained | <i>1-5; 1=disagree, 5=agree</i> | |
| | <u>Conference facility</u> can hold ~300 ppl, allows for a range of meeting formats (concurrent sessions, posters, exhibitors, etc.), convenient to amenities (lodging, food service, airport,...) | <i>1-5; 1=disagree, 5=agree</i> | |
| | <u>Field sites</u> are < 2 hours from conference facility and include innovative silviculture demonstrations and cutting edge research | <i>1-5; 1=disagree, 5=agree</i> | |
| Conference Vision (5 points max.) | "An event with an applied management and silviculture emphasis" is likely | <i>1=Yes agree, 0.5=Possibly, 0=No disagree</i> | |
| | "An inclusive, welcoming event to all interested in the current and future status of forests" is likely | <i>1=Yes agree, 0.5=Possibly, 0=No disagree</i> | |
| | "A go-to event where cutting-edge science and innovative management practices/uses are exchanged" is likely | <i>1=Yes agree, 0.5=Possibly, 0=No disagree</i> | |
| | "A responsive event that highlights urgent needs in northern hardwood forest ecology and management" is likely | <i>1=Yes agree, 0.5=Possibly, 0=No disagree</i> | |
| | Potential timeframe does not likely conflict with other major conferences (e.g., SAF, CIF, NAFEW, etc.) | <i>1=Yes agree, 0.5=Possibly, 0=No disagree</i> | |
| DEI (5 points max.) | Conference DEI leader selected or process for selection clear | <i>1=Yes agree, 0.5=Possibly, 0=No disagree</i> | |
| | Potential agenda is diverse in gender, geographical region, discipline, career stage, and race | <i>1=Yes agree, 0.5=Possibly, 0=No disagree</i> | |
| SCORE (30 points max.) | ~33% Logistics, ~33% Resources, ~17% Vision, ~17% DEI | Sum | |