

How to invite participants to your hybrid workshop

Hybrid workshops present an added challenge for organizers issuing invitations to prospective participants. In order to allot in-person slots effectively and avoid situations where in-person participation is offered and subsequently revoked, organizers are expected to determine which prospective participants receive in-person invitations and which should receive virtual invitations.

In-person participant assignments should be submitted at least **3 weeks prior to your workshop start date**. Changes can always be made and assignments can be changed from in-person to virtual or vice versa at any time. However, the Banff Centre needs an estimate of in-person participation numbers 3 weeks before your event.

- Note: Speakers can attend virtually or in person.

Sending invitations

To issue invitations, follow these steps:

1. **Register.** Register for an account in [Workshops](#) (if you have not already registered). The system will send you a confirmation email; if you don't see it in your inbox, check your junk mail/spam folder.
2. **Log in.** Log in to [Workshops](#), and navigate to your upcoming workshop.
3. **Add Members.** If you have not yet added participants to your workshop, click **Add Members** in the sidebar. Note the select menu **Add members with role**. Participants who you wish to invite to attend in-person should be added with role **Participant**, and those who you wish to invite to attend online should be added with the role **Virtual Participant**.
 - 3.1. Once you have added new members to your workshop, they will appear under **Not Yet Invited Members**.
 - Note: BIRS has the records of thousands of researchers in the mathematical sciences community in its database, identified by their email address. If an email address that you enter matches a record in our database, that record will be immediately added to your event. So, you could just enter one email address per line (without names and affiliations), and if they match records in our database, they will be added to your event. If they do not match, you will be presented with another form to enter the names and affiliations for new records.

4. **Edit Roles.** In your list of workshop members, a video icon will appear before the names of Virtual Participants. Click the names of participants, and then **Edit**, to change a participant's role from **Virtual Participant** to **Participant** (or vice versa, depending on how you wish to invite them). **Organizer** roles can be changed to **Virtual Organizer**.
 - Note: If you already have confirmed participants on this page, please confirm that the roles **Participant** or **Virtual Participant** are assigned correctly. You may need to contact individual participants and arrange different roles if someone who is ineligible to travel to Banff is assigned as a **Participant**.
5. **Send Invitations.** Once you have assigned roles to all participants, navigate on the left to **Invite Members**, and send out invitations.
 - 5.1. The invitation email that participants will receive includes a PDF letter signed by the BIRS director with instructions for how to RSVP online via a special link, unique to each participant.
 - 5.2. After you send an invitation, participants will be moved from the **Not Yet Invited** list to the **Invited** list. The date that they were invited appears beside their name, and if you hover over the date, the specific details will be shown in a pop-up. This includes the date we requested that they reply by. Invited participants who have not replied by the requested date will be highlighted.
 - 5.3. The membership list will automatically update as people confirm or decline invitations, moving them into separate lists.
 - Note: *Participants* will be provided an option to attend virtually, but *Virtual Participants* will not be provided an option to attend in-person.
6. **Send reminder emails to invited participants.** To send a reminder, click **Invite Members** in the navigation bar. Under **Invited Members**, select the checkbox beside their name, and then click **Send Reminder**.
 - 6.1. Members who have been sent reminders will have a curved arrow icon beside the **Invited On** date. Hover over the icon to see the details of when the reminder was sent, and what the Reply-by date was in that reminder email.
7. **Monitor your participant list.** Please review your membership list periodically, and try to ensure that you have **in-person confirmations 3 weeks before your workshop**. If any participants reply to you directly, click their names and edit their attendance status to **Confirmed, Declined, etc.** Alternatively, you can ask us to update this for you by sending an email to birs@birs.ca.