

Objective

The International Association of Facilitators is the worldwide professional body established to promote, support and advance the profession and practice of professional facilitation through methods exchange, professional growth, practical research and collegial networking.

The IAF establishes this policy as a protocol to ensure that there are sound organizational and financial procedures in place for each IAF Regional conference and has set out a series of requirements and advice on organizing IAF conferences

The prime objective of IAF conferences at any level is to provide IAF members, other interested individuals and related organizations with state of the art information, case studies, research and exhibits to assist in the advancement of facilitation as a profession, benefit the practice of facilitators as well as create and enhance the relationships between our members and professionals who use facilitation in their practice.

It is recognized that the conferences take many shapes and forms. This Policy serves as guideline, alongside the Conference Manual provided to organizing committees to ensure the proper steps are taken for a financially and reputationally successful event.

This policy establishes 3 levels for IAF organized/hosted conferences, alongside a special category of conference:

- Global Conference (Level I)
- Regional Conference (Level II)
- National/Chapter (Level III)
- Specialized Conference (Special Category)

This policy is supported by the following Guidelines and Procedures:

- Conference Manual Guideline
 - Global Conference Guideline
 - Request for Global Conference Hosting Procedure
 - Regional Conference Guideline
 - Request for Regional Conference Hosting Procedure
 - National/Chapter Conference Licensing Procedure
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promoting the power
of facilitation worldwide

Section – 08 Conferences– 2

IAF Policy & Operating Manual

3 – Tier Conference Policy and Guidelines

**GLOBAL CONFERENCE
Definition and scope**

- 1. Frequency:**
 - Every 2-3 years, beginning in 2020
 - 2. Host Location:**
 - Selected by an Evaluation Committee headed by the Director of Conferences and Events, two additional members of the IAF Board and two past chairs of regional or global conferences.
 - Candidate cities/organizing teams will submit a Request for Global Conference Hosting at least 30 months prior of the proposed Global Conference dates.
 - The same city is discouraged to host consecutive Global Conferences.
 - 3. IAF Global Role**
 - Conference planning
 - Heads the Global Content Team comprised of volunteers from around the world (at least one from each region).
 - Provides the conference management system for registration and financial management.
 - Contracts professional marketing/event management services company.
 - Fully supports the Local Organizing Team (LOT) in charge of local content (in case of a bilingual conference), logistics, venue and local or on-site volunteer management, social events, local marketing etc.
 - The Local Organizing Team
 - 4. Financial management**
 - All proceeds and profits go to IAF Global.
 - The approved budget should be consider a profit to be achieved.
 - All financial risk is backed by IAF Global.
 - IAF Global will provide full support to the Local Organizing Team (LOT).
 - The Local Organizing Team shall be a legally recognized entity within the country hosting the Conference hereafter may be referred to as the "Local Partner", who can commit to signing contracts on behalf of the conference.
 - All local taxes concerning the expenses from the conference shall be paid by the LOT.
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- Discounted registration for IAF members and partners is mandatory.

5. Language of content

- Official language is English (at least 70%)
- Tracks in local language are encouraged but not mandatory
- Simultaneous translation in other languages for specific sessions (keynotes, specific workshops, etc.) is encouraged

6. Relation with other IAF initiatives

- Single FIA Awards Ceremony during that year
 - CPF Assessment event prior to the conference
 - IAF Annual General Meeting hosted at the event.
 - Annual IAF Board Meeting prior to the Conference
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**REGIONAL
CONFERENCE Definition
and scope**

1. Frequency:

- Annual, with the exception of the year the Global Conference takes place.

2. Host Location and Local Organizing Team (LOT):

- Selected by an Evaluation Committee headed by the Regional Director and at least two prior Global/Regional Conference chairs.
 - Candidate cities/Local Organizing Teams will submit a Request for Conference Hosting at least 18 months prior of the proposed Conference dates.
 - The same city can not host consecutive Regional Conferences.
 - Local Organizing Teams can be formed by an IAF Chapter, local members, associations, NGO's, companies, individual members or any combination of the prior. At least one of the members of the LOT shall be a recognized legal entity (Local Partner) in the hosting country.
 - If a Chapter exists and another organization (Local Partner) wants to host a conference, the Local Partner needs to obtain documented approval by the local Chapter and agree on the level of support that the LOT can expect from the Chapter (Levels A,B,C,D).
Level A: Equal Partner, the Chapter and the Local Partner(s) share the profits and risks equally;
Level B: Minority Partner, the Local Partner(s) receives most
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of the profits and is in charge of the majority of the financial risk in an agreed percentage with the Chapter;

Level C: Content Partner, the Chapter agrees to support the Local Partner of the conference supporting the creation of the Programme and the volunteering with no financial involvement;

Level D: Participant Partner, all the organization of the conference is done by the Local Partner and the Chapter only supports the marketing efforts and participation of its members in the event.

- A local Chapter can veto an organization in accordance to the Regional Conference Guidelines to host through a formal request and motives explanation directed to the IAF Board of Directors during the Request for Conference Hosting Phase.

3. IAF Global Role

- IAF will provide support to the Conference Core Team (CCT) with training, formats, templates, databases, etc. Director of Conference participates and support the CCT meetings.
- Provides support for the conference management system for registration and financial system as needed by the LOT.
- Creates event in social media and supports marketing of the event through IAF Global channels (social media, email databases, etc.).

4. Financial management

- The Local Organizing Team must have a Local Partner (LOT and the Local Partner can also be the same entity) which must be a legally recognized entity in the hosting country as all taxes are expected to be paid locally
- All contracts are signed by the Local Partner which retains financial liability of the event
- Fixed maximum liability to IAF Global is \$10,000 USD
- All profits are shared 50-50 between the LOT(Local Partner) and the IAF Global.
- Budget needs to be reviewed and approved by IAF global
- Financial and registration reports should be sent to the Director of Conferences at least once a month, and during the prior 3 months of the conference at least every two weeks.
- Discounted registration for IAF members is expected

5. Language of Content

- Official language: English
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**NATIONAL/CHAPTER
CONFERENCE**
Definition and scope

6. Relation with other IAF initiatives

- Regional FIA Awards Ceremony during that year
 - CPF Assessment event prior to the conference
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1. Frequency:

- Depends on the Chapter
- It should be scheduled at least 5 months prior and 3 months after the IAF Global Conference.

2. Location:

- Selected by the IAF Chapter or the National Conference Team.

3. Global Office Role

- Verifies the correct usage of IAF Logos and branding.
- In case that a National Conference is organized by an organization that is not a Chapter an upfront Licensing Fee is charged. This is done prior to any edition of the conference.
- For a fixed fee it provides the conference management system for registration and financial system support.
- Receives no direct support from the Director of Conferences
- Provides access to Conference Manual, templates and general materials.
- The Conference Director through the IAF Board keeps the authority to retire the IAF support in case there are any breaches to the IAF Code of Ethics or the signed agreement.

4. Financial management

- All contracts are signed by the IAF Chapter/Licensee, no liability to IAF Global.
- All profits are kept by the Chapter/Licensee.
- Discounts for IAF members are expected.

5. Language of Content

- Official language: local (defined by Chapter/Licensee).

6. Relation with other IAF initiatives

**SPECIALIZED
CONFERENCE**
Definition and scope

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- FIA Awards Ceremony possible but not mandatory
 - CPF Assessment event prior to the conference possible but not mandatory
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1. Frequency:

- Varies
- It can't occur during in the same calendar year of the Global Conference.

2. Location:

- Selected by the Organizing Committee/Sponsors/Special Interest Group with support from the IAF Director for Conference in case it is needed

3. Types of specialized conferences

- Language based: Francophone, Lusophone, etc.
- Industry based: Community based facilitation, Corporate Facilitation, etc.
- Method based: Agile, Technology of Participation, Art of Hosting, Lego Serious Play, etc.
- Alternative gatherings: Unconferences, Virtual Conferences, etc.

4. Global Office Role

- Verifies the correct usage of IAF Logos and branding.
- In case the specialized conference is organized by an organization that is not a Chapter or a recognized IAF Special Interest Group or Committee a one time upfront Licensing Fee is charged.
- For a fixed fee it provides the conference management system for registration and financial system.
- Provides access to Conference Manual, templates, support documents, logos, etc.
- Might participate in an Advisory role if the Organizing Committee invites members of the Board to participate.

5. Financial management

- All contracts are signed by the Organizing Committee, who keeps the financial liability.
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- A limited liability of \$3000 USD can be agreed by IAF Global, in case the conference is accepted as part of the official conferences endorsed by IAF Global.
- Before profits are distributed, any financial support from IAF Global should be reimbursed. The rest of the profits are kept by the Organizing Committee and the member organizations (Chapters, SIG's, IAF Global, etc), unless other initial agreements are established.
- Discounts for IAF members are required.

6. Language of Content

- Official language: English unless another local language is the focus of the event.

7. Relation with other IAF initiatives

- FIA Awards Ceremony possible but not mandatory
 - CPF Assessment event prior to the conference possible but not mandatory
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