



promoting the power  
of facilitation worldwide

# IAF Conference Manual

July 2016

## PREFACE

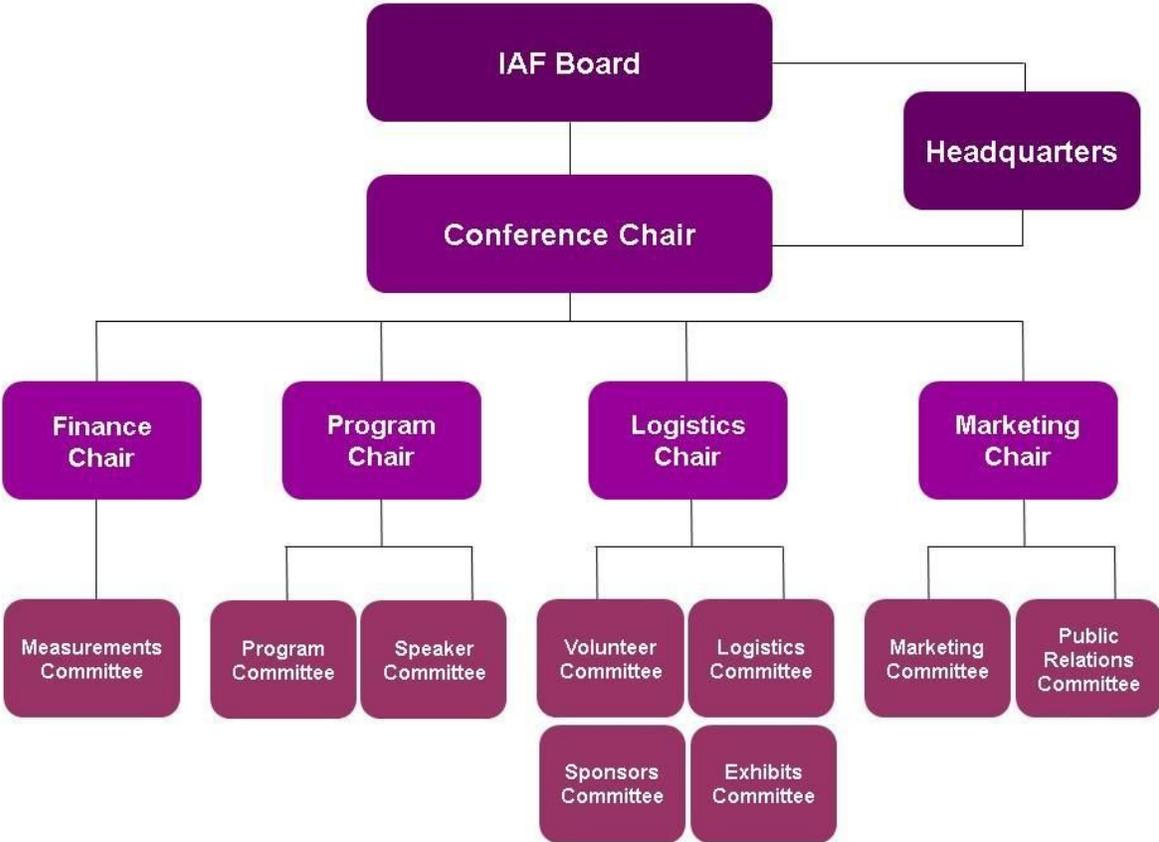
The prime objective of IAF conferences is to provide IAF members, other individuals and organizations with information and exhibits to assist in the advancement of Facilitation and related to the arts and sciences of Facilitation.

To accomplish this objective, the IAF will:

1. Encourage Conference Steering and/or Organizing Committees to develop programs suitable to the needs of attendees, session facilitators and other participants for which each conference is intended.
1. Encourage all IAF regions or chapters to conduct conferences, which should benefit the interests of IAF membership and the greater facilitation community.
2. Encourage cooperation between regions and chapters to promote, plan, organize and schedule conferences and exhibitions in a timely fashion within the stated field of interest.

The success of an IAF conference depends on the dedication and teamwork of the organizers who volunteer to run the event. Conference organizers serve different roles within the conference committees. If you are an IAF conference organizer, this manual will provide you with useful information and valuable advice to help you make the most of your conference.

# SECTION I: ROLES AND RESPONSIBILITIES



## IAF Board Responsibilities

### IAF Board

The IAF Board has overall responsibility for the sound financial governance of the IAF and its activities. Its aim is to be assured that sound procedures are in place and that the IAF at local, regional and international level is not overexposed to financial risks and liabilities. These responsibilities may be delegated to the Chair, Treasurer and Conferences Director between meetings or in circumstances where prompt action needs to be taken.

The Board also wishes to provide appropriate support to the organisation of conferences that are primarily run by IAF members and chapters on a non-paid basis.

### **Treasurer**

The Treasurer and Conferences Director can provide help and support to Regional Director's Representatives and conference organising committees on budgeting and financial reporting and trends, potential challenges and examples of good practice across the IAF.

### **Conferences Director**

The Conferences Director is responsible for the international programme of conferences and the coordination of initiatives across the regions. Their role is to support Regional Directors and local organising committees in organising a successful conference.

## **Regional Director**

Regional Directors have responsibility for IAF activities within the region including the conferences. Their role is to help and advise the local organising committee drawing on the experience of previous conferences; keep the Board informed through the Treasurer and Conferences Director of key developments; submit the budget and monthly financial reports to the Board; ensure any agreed upon actions are taken. The regional director also provides the local organising committee with a region-wide perspective.

## **Headquarters**

IAF Headquarters will act as an advisor for venue contract review, selection and negotiation; budget creation; and attaining the appropriate insurance for regional conferences.

## **Local Organizing Committee**

The local organizing committee is responsible for drawing up the budget in line with the conferences activities and program they are planning; for monitoring progress on the budget, and keeping the Regional Director (and Conferences Director) informed of developments.

## **Local Organizing Committee Roles and Responsibilities**

One of the first steps in organizing a conference is setting up the Local Organizing Committee, with people responsible for all aspects of the event.

The expectation placed on any of the local organizing committee is that they escalate and call for assistance from the Regional Director and/or the IAF Chair should they feel that the conference risks being either a loss making venture or that will reflect poorly on the association.

There are five key roles that should be appointed to ensure a successful conference:

### **Conference Chair**

The Conference Chair is appointed by the sponsoring organization. Responsibilities of the Conference Chair include (but are not limited to) the following:

- ✓ Venue Selection: The Conference Chair, in conjunction with IAF Headquarters, selects an appropriate venue for the conference
- ...
- ✓ Timeline Management: The Conference Chair should be aware of all deadlines associated with venues, catering, printing, etc. Important dates should be tracked.

Creating a critical path is a good way to monitor planning progress.

- ✓ **Budget Management:** It is the responsibility of the Conference Chair, in conjunction with the IAF Board, to ensure that the conference is planned in a fiscally responsible manner
- ✓ **Reporting:** The Conference Chair is responsible for reporting to the Regional Director (and Conferences Director) on the progress of planning
- ✓ **Forming Committees:** It is the responsibility of the Conference Chair to appoint the chairs of the other committees

## Recommended Conference Committee Chairs

### **Finance Chair/Conference Treasurer**

The Finance Chair/Conference Treasurer is appointed by the Conference Chair and is responsible for ensuring all financial, tax and audit requirements are met. Some of these requirements include establishing conference bank accounts, budget and expense management, indirect tax, insurance and bonding, financial reports and conference closing.

### **Program Chair**

The Program Chair is appointed by the Conference Chair and is responsible for overseeing the development of the conference program. A successful program is well-balanced and should meet the elements of IAF Conference Requirements, and reflect the IAF Statement of Values and Codes of Ethics and the CPR Core Competencies. The Program Chair will lead the Call for Proposals through the selection, review and acceptance/rejection of all submitted proposals.

### **Logistics Chair**

The Logistics Chair coordinates the relationship with the venue, registration, sponsor/exhibitor fulfillment and assists with scheduling of sessions rooms and local arrangements for delegates

### **Marketing & Public Relations Chair**

The Marketing & Public Relations Chair is appointed by the Conference Chair and is responsible for promoting the conference, in consultation with the IAF Director for Communications. The Marketing & Public Relations Chair will gather, maintain and utilize lists of media contacts and past/potential attendees for targeted outreach; coordinate placements in various publication calendars and advertisements in IAF and non-IAF publications and news media; manage the website, email campaigns, newsletters and social media applications.

Depending on the size and scope of the conference, these chairs may set up committees to work with them.

## **Recommended Conference Committees**

Your conference may choose to establish committees to assist with specific functions. These committees are merely suggestions; feel free to establish the number and type of committees particular to the needs of a specific conference. Be sure to create a clear definition of roles and responsibilities and a reporting structure.

### **Measurements Committee**

Reporting to the **Finance Chair/Conference Treasurer**, the measurements committee plans, develops, administers measurement tools and processes. This may include delegate feedback to session presenters, delegate feedback to the Local Organizing Committee, evaluation of external contractors, if any.

IAF is exploring statistical processing software for all conferences to facilitate better year-to-year evaluation, trends and best practices.

### **Program Committee**

Reporting to the **Program Chair**, the Program Committee administers the Call for Proposals process, selection and acceptance/rejection communications prior to the conference.

### **Speaker Committee**

Reporting to the **Program Chair**, the Speaker Committee identifies, vets and recommends keynote speaker(s) (if required)

### **Volunteer Committee**

Reporting to the **Logistics Chair**, the Volunteer Committee recruits, trains and assigns volunteers as needed and available.

The Volunteer Committee may choose to hire temporary staff to run the conference. This may include conference management services, staff from a temporary agency, or independent contractors. Approval from IAF is not required to hire temporary staff; however, this expense should be accounted for in the conference budget.

### **Registration Committee**

Reporting to the **Logistics Chair**, the Registration Committee plans and runs conference

registration (both advance and on site) procedures and logistics, including communications with potential attendees and Delegates, handling of credit card fees, cancellation policy, and creation of name badges; or, it manages a registration-management company

### **Sponsors Committee**

Reporting to the **Logistics Chair**, the Sponsors Committee ensure proper contract fulfillment, sponsorship activation and appreciation follow-up. As many potential sponsors require lengthy advance cultivation, proposals and ongoing communications, coordinating efforts with IAF Global Conferences Director, Director of Communications, prior and succeeding Local Organizing Committees, etc. is helpful.

### **Exhibits Committee**

Reporting to the **Logistics Chair**, the Exhibits Committee ensures the proper handling of contracts, floorplans, exhibitor registration, security and other logistics. The Exhibits Committee may also oversee the hiring and coordinating of an exhibits management company.

### **Logistics Committee**

Reporting to the **Logistics Chair**, the Logistics Committee acts as liaison with the venue, local vendors, management companies and other committees in implementing the event as planning. Key responsibilities include room set-ups, signage, event flow, emergency preparations, etc.

### **Local Arrangements Committee**

Reporting to the **Logistics Chair**, the Local Arrangements Committee coordinates hiring entertainment, tours and other local area amenities, as needed. The committee also works with the local Convention & Visitor's Bureau (if applicable).

### **Marketing Committee**

Reporting to the **Marketing and Public Relations Chair**, the Marketing Committee coordinates planning, designing, developing and implementing website, email campaigns, newsletters and social media activity before, during and after the conference

### **Public Relations Committee**

Reporting to the **Marketing and Public Relations Chair**, the Public Relations Committee arranges and coordinates media relations, suitable materials, and communications with existing and potential partner organizations, as applicable.

## SECTION II: GETTING STARTED

### Pre-Conference Planning

Conference planning begins a minimum of **12 to 18 months** in advance of the conference date. A portion of the pre-planning is completed before you submit an IAF Conference Application including selecting a venue and obtaining sponsorship(s). Please note: Many IAF Chapters have their own processes that must be completed to obtain sponsorship approval. You are encouraged to check with your Regional Director before submitted your conference proposals to IAF.

Pre-conference planning also includes preparing a budget, negotiating contracts with vendors and planning registration. The IAF Conferences Director and Regional Director will support these stages of the planning process.

**Please note**: All venue contracts and conference budgets should be reviewed by IAF Headquarters in advance of final confirmation.

[Learn more about pre-conference planning](#)

### Submitting an IAF Conference Application

Submit the IAF Conference Application to register and request approval for your conference from the IAF Board. Your conference must be approved by the IAF Board before you can promote IAF sponsorship or use the IAF brand. After your conference is approved, your conference will be listed on the IAF Website and Conference Search and IAF Call for Proposals.

[Conference Application](#)

### Completing the Conference Agreement

The purpose of the Conference Agreement is to ensure that the Local Organising Committee understands their responsibilities in organising an IAF branded conference and to offer help and assistance in organising the conference. In particular, the purpose of the Conference Agreement is:

- ✓ To ensure that sound financial procedures are in place for each IAF Global or Regional conference
- ✓ To clarify the roles and responsibilities of the IAF Board, Regional Director and Local

## Organizing Committee

- ✓ To take a shared approach to the risks and benefits involved in staging an IAF Global Conference
- ✓ To provide appropriate support and assistance to conference organising teams and share best practices

## Conference Agreement

## Conference Financial Management

### Preparing the Conference Budget

It is the expectation of the IAF Board that the Local Organising Committee, together with the Regional Director, develop a budget for the conference. The conference budget must be submitted by the Regional Director to the IAF Board **at least 12 months** prior to the conference. The budget must be approved by the Board before any notice of the conference or call for proposals is advertised.

Budgets must be based on non-deficit expectations and be set to generate a **minimum surplus of 15%** over projected expenses. The budget and supporting financial report must include:

- ✓ A breakdown of anticipated income and expenditure
- ✓ Projections on delegate numbers that underpin the budget
- ✓ Number of delegates the conference needs to attract to break even
- ✓ A contingency plan based on the conference attracting fewer delegates than projected and when this plan will be activated and what steps will be taken to reduce expenditure to reach breakeven

Any revised budget may be submitted at any time during the planning process. Significant revisions (changes in excess of **10% of original budget**) must be approved by the IAF Board.

The Regional Director will include a report on the financial progress of the conference at each full meeting of the board.

## Conference Budget Plan

### Requesting a Conference Grant

Once your conference application has been approved, you can request a conference

grant from your sponsoring IAF region. The conference grant is an asset for start-up finances to help organize a conference prior to any registration funds being generated, and if accepted, creates a liability to be repaid out of event proceeds.

If your sponsoring IAF Regional Director approves the grant, the Regional Director will contact the IAF Conference Director to process the request. The conference grant must be approved by the IAF Board.

The following steps should be taken to request a conference grant:

1. Request of start-up grant by Regional Director to the Board. Logically, this would be at the same time as the budget is brought to the Board
2. Approval of the Board for both budget and grant
3. Complete voucher and send to IAF Administrative Office along with signed agreement between Regional Director, on behalf

### **Meeting Local and Indirect Tax Requirements**

The country or local government where your conference is held may have specific tax requirements. Each conference must comply with local taxes and indirect taxes, such as Sales Tax, the Value Added Tax (VAT), Goods and Services Tax (GST) or Harmonized Sales Tax (HST) (in some Canadian provinces).

### **Acquiring Event Insurance**

General Liability insurance protects IAF and all parties involved in the event-the committee, venue, caterers, etc., for losses due to bodily injury or property damage caused by the insured's employees or agents. Many venues and vendors won't do business with a planner or company that does not have insurance. IAF Headquarters will offer support to ensure the proper insurance is acquired prior to the conference.

### **Financial Reporting**

A final financial report should be completed no later than four (4) months after the conference end date. This report is submitted to the IAF Regional Director, Conference Director and IAF Board.

To close conference financials, ensure the following items are completed:

- ✓ Repay all loans
- ✓ All physical assets have been distributed (conference proceedings or digest). These materials can be in digital format
- ✓ A review (or an audit, if required) of financial records of surplus, disposal of physical assets and loan repayment

- ✓ Final arrangements regarding conference proceedings

### **Conference Revenue Distribution**

All of IAF conferences will share surplus and liabilities equally – IAF Global, Regional Office and Conference Organizer (if any), 1/3 of the surplus to each party. Expected liability will be included in the financial statements each year. For these purposes, **surplus** is defined as net liquid assets after all revenue, expenses and liabilities are met. The income of endorsement and sponsorship to the conference is also included in the formula based on the principle of surplus sharing.

### **Selecting the Appropriate Venue**

When selecting the conference venue, it is important to consider the following factors in your vetting process:

- ✓ **Cost.** Be sure to understand the fees associated with renting the space, the minimum expenditures for food & beverage as well as any service charges that may be required.
- ✓ **Location.** If you are expecting a number of out-of-town delegates, consider a hosting the event at a venue near the airport and hotels. Be mindful of the pricing of nearby restaurants for meals not included in the conference fee.
- ✓ **Contract, Cancellation and Attrition Clauses.** Ensure you understand the language of the contract and don't be afraid to ask for clarification / simplification. Cancellation and attrition clauses are crucial for managing financial risk.
- ✓ **Services and Amenities.** Is there on-site catering? Does the venue offer tables, linens and chairs? Is there any built-in AV? Does the venue have Wi-Fi? Is it complimentary? This can play a significant role in your event budget.
- ✓ **Capacity.** Be sure to inquire about how many people can fit into the space while still abiding by fire and safety codes.
- ✓ **Flow.** Is there "short travel time" between session rooms? Is there enough space for your attendees to move freely and comfortably throughout the space?
- ✓ **Ambience.** Look for elements such as soundproofing between rooms, natural light, clean air and ceiling height when choosing a venue.
- ✓ **Accessibility.** Ensure your venue is accessible for all delegates, especially those with special needs.

### **Hotel Accommodations (if applicable)**

Attendees should be advised of the price of hotel; exact percent of taxes levied; any other fees or charges levied; the amenities offered; the group code for registering; the telephone number, address, website and directions to the hotel; and the availability of internet in their rooms or on-site, whether parking is included, etc.

Attendees should be encouraged to stay at the chosen conference hotel. A penalty is paid by the Association if the contracted room block is not met.

**Please note:** All venue contracts should be reviewed by IAF Headquarters in advance of signing.

## Conference Branding

IAF maintains a consistent global identity through the use of the IAF Master Brand. By using the IAF brand on your Web site and conference materials, your conference will be identified with IAF. It is important that you protect the IAF name and brand through the proper use of the brand, trademarks, and copyright.

Review and follow the [IAF Branding Manual for the use of the IAF brand, logos, trademarks, and copyrights](#) for detailed information on how to maintain the IAF Brand.

- ✓ **IAF Booth/Display.** It is critical to have a professional IAF display that attracts conference participants to seek information and easily sign-up for membership during the conference.
- ✓ **Use of IAF Logo.** All IAF conferences by definition use the IAF logo on the conference promotional material, website, conference banners, and IAF display booth. IAF Global provides these logos digitally in advance at no extra charge. A conference may choose to use the Global logo, or Regional logos.
- ✓ **The IAF Global Chair** or her/his representative is customarily invited to say a few words of welcome during the opening session and present the other board members at an appropriate time during the conference.

## SECTION III: PLANNING THE CONFERENCE

### Conference Registration

#### **Setting Registration Fees**

The Financial Chair/Conference Treasurer, in conjunction with the Conference Chair, sets the registration fees when preparing the budget. These fees should cover the cost of running the conference based on the anticipated attendance. Fees will vary accordingly to geography and venue.

An essential part of an IAF conference is that members enjoy a lower fee to attend IAF conferences than non-members. Ideally, the differences between the two rates should be equal to or greater than the cost of joining IAF. This will apply to day-long workshops, if any,

held prior to or after the main conference as well as the conference fees.

Advance registration fees or "early bird" registration fees are also established to encourage early registration at discounted pricing. Discounts may also be considered for such categories as presenters, students, etc. It is important to clearly define in advance the fees for each group attending the conference.

In order to minimize confusion and the potential complexity of elaborate fees matrices, Local Organizing Committees may choose to require every Delegate become an IAF member before then selecting a simpler fee for the desired duration and/or conference elements offered. Any offer of a reduced IAF Member fee to encourage this choice must be previously approved by IAF Global.

Every conference organizer should waive at least three (3) IAF Global board members' registration fee as reimbursements to support board members attending the conference. Board member travel expenses are not covered

Choosing who from the board is granted the conference fee waiver will be in consultation with the Director for Conferences See policy resolution from July 28, 2016: [Resolution re: conference Waiver](#):

### **Offering Conference Scholarships/Bursaries**

Local Organizing Committees may choose to offer scholarships/bursaries upon request within the conference budget to support selected delegates such as voluntary and community-based practitioners, students and others who may otherwise have difficulty in attending the conference.

Conference scholarships/bursaries cover the conference registration fee. The cost of transportation, pre/post conference training and other personal expenses are NOT included in the conference scholarship policy.

### **Setting Up Registration**

Registration is often the first experience attendees have with your conference.

Registration should be set-up **four (4) to six (6) months** prior to the conference date. Early registration helps conference organizers manage finances and session numbers. Most attendees prefer to register before they make their travel and hotel arrangements.

Follow these steps to ensure a smooth registration process:

- ✓ Develop the registration form (i.e. identify information you will require from attendees such as contact information, dietary restrictions, accessibility needs)
- ✓ Establish a clear cancellation policy

- ✓ Set-up registration form online
- ✓ Set-up credit card processing, and possible other payments if desired
- ✓ Confirm eligibility for requested rates, preferably using API link to Global database
- ✓ Create automated confirmation notice and receipt
- ✓ Clearly outline transportation and accommodation options for delegates and any applicable discounts offered to conference delegates
- ✓ Understand troubleshooting for possible issues (i.e. refunds)
- ✓ Test the site prior to launch

On-site considerations should also be taken into account early on in the planning process. This includes preparations for name badges and delegate kits; determining hours and staffing needs; and sourcing equipment for the registration area (desks, computers, credit card processing, etc.)

### **Selecting a Registration Service**

Alternatively, many conferences hire a registration service or select an online event-management tool. A full-service registration or event-management contractor can manage the entire process and be the first line of communication to address attendee questions. Online event-management tools provide registration forms, database-management tools, reports, and other services to help you manage your registration.

By the summer of 2017, IAF World Website will host a conference registration system. That means that conference organisers won't have to set this up themselves anymore.

### **Monitoring Registration**

Registration numbers should be consistently monitored in order to prepare for capacity, required food & beverage numbers, etc. Reports should be pulled on a **weekly basis** to efficiently track registered delegates. A member of the Registration Committee should also be readily available to field attendee questions and resolve issues. The Board may request updates on registration numbers from the Conference Organizing team.

### **Providing a Letter for VISA Applications**

Some participants may need to provide a letter from the IAF Regional Director as part of their application for a visa. You can help by providing information on how to apply for a visa

and reminding them to start the process early. Applicants should apply no later than three months (or longer if so instructed by applicable agency) prior to the conference. For security purposes so only authentic delegates may secure such travel documentation, Delegates should ideally have fully paid their registration fee and been verified (using IAF Global database if an IAF Member) prior to being provided any requested visa application letter or similar documentation. Some countries also require that conferences be pre-registered with a government agency to assist verification by border crossing agents. Other international customs letters and arrangements may also be needed for transporting Presenter materials before and after a conference.

### **Managing On-Site Registration**

The Registration Committee and its volunteers provide on-site check-in and support for peak arrival and selected hours during the conference. The goal is to process on-site registration check-in as efficiently as possible. Responsibilities of on-site registration include:

- ✓ Preparation of name badges and delegate kits
- ✓ Check-in delegates and process walk-in registrations
  
- ✓ Field attendee questions

Some delegates may want to sign up for different sessions, if allowed, or have yet to complete that process before arrival. The Local Organizing Committee and Registration Committee work closely to plan and manage on-site session changing. If the Committee chooses to allow session changes, staff should be trained how on to make the change and presenters should be notified as able.

## **Conference Programming/Speakers**

### **Call for Proposals**

The various IAF conferences have different process systems featuring peer reviews of the workshop proposals. The Program Committee, composed of individuals with significant experience in specific track/stream areas, are assigned to review all proposals submitted in that track/stream.

Well-facilitated sessions are the backbone of IAF conferences. Whether short 90-120 minute sessions, or longer one to two day workshops, they should demonstrate best-practice facilitation.

IAF conference programs are learning experiences and as such are non-commercial.

Speakers should refrain from using brand names and endorsing specific products. Under no circumstances should a Society podium be used as a place for direct promotion of a speaker's product, service, or monetary self-interest. Speakers also must refrain from over statements, harsh language, or pointed humor that disparages the rightful dignity and social equity of any individual or group.

IAF continues to seek a balance slate of facilitators with a diversity of backgrounds, viewpoints and organizational affiliations.

**Proposal Review.** The review process gives consideration to balanced geographical, cultural, gender and topical representation to meet the conference theme. All sessions, whether short or one or multiple-day sessions, need to show evidence of the IAF Core Competencies by listing competencies they intent to demonstrate. The selection process follows a rigorous online review of every proposal submitted. The committee also meets in person or conference call to make recommendations for selections and assist in other conference educational activities. Many more proposals are submitted than can be selected. Only the very best are selected.

Proposals are reviewed on the basis of information submitted. Submitters are expected to follow the instructions carefully and supply all requested information. Missing or incorrect information could make the proposal ineligible for consideration.

**Proposal Selection.** The proposed session must clearly apply to the target audience, fit into the conference theme, match at least one of the Learning Approaches, and be delivered by a speaker with substantial topic knowledge and experience facilitating learning experiences and/or facilitating large groups.

Proposals are evaluated using the following additional criteria:

- ✓ Shows evidence of CPF Core Competencies
- ✓ Content is current, practical or innovative as it relates to the workplace learning and facilitation field
- ✓ Programs and initiatives that demonstrate facilitator core competencies or measurable business impact and results
- ✓ Global issues addressing interests of the international community and multi-national organizations
- ✓ Application-focused learning objectives that can be realistically met in the time allotted
- ✓ A balanced slate of facilitators representing diverse backgrounds, viewpoints, organizations and geography

Proposals must be complete, accurate, clear and specific. Any proposal that does not follow

the instructions is ineligible.

**Notification.** The Program Committee can contract facilitators to adjust the proposal and notify all facilitators of an accepted or rejected proposal via email. Additional communications are also necessary by the Logistics Committee closer to the event. Many conferences recruit, train and coordinate a Speaker Buddy network to assist with such details. A Speaker Buddy is a conference participant who has registered for a session and who has volunteered to assist with that session.

## Speaker Buddy Guideline

### **Honoraria, Travel Expenses & Complimentary Registration**

As a non-profit educational association, IAF does not pay an honorarium for session facilitators at the conference. Facilitators must cover all of their individual travel and accommodation expenses. Session facilitators are considered participants in the conference in addition to their workshop facilitation. They are expected to register and pay for the conference at the IAF member or presenter rate. While some conferences have permitted pre-conference full-day workshop facilitators to share in their workshop proceeds at rates varying from 40-50% after expenses, others feel strongly that this system may be perceived as unfair to other presenters not being compensated. Not paying any presenter instead of selecting which one to pay is most consistent with the non-honorarium intent.

### **Session Scheduling**

To achieve a balanced conference program, the Local Organizing Committee determines the days and times sessions are scheduled. Some facilitators may be asked to repeat sessions that are considered especially relevant or popular. Consideration should be given to grouping identical length sessions to encourage delegate networking during common breaks as applicable to venue constraints.

### **Session Evaluation**

To measure the success of a selected session, feedback forms should be provided at each session for attendees to rate how well the competencies were demonstrated at each workshop. [Feedback Form](#)

## Conference Schedule

### **Plenary/Whole Group Sessions**

**Opening.** The conference opening sets the tone for participation and builds an environment

of collaboration. It is important to carefully design a large, interactive opening that allows participants to meet and talk about some aspect of facilitation.

The opening often highlights the conference location and theme with a brief acknowledgment of key sponsors and attendees from outside the host nation. An introduction of the IAF Global Board chair (or Board representative) is also customarily in order for her/him to say a few words of welcome to symbolize that this is a global IAF conference. A large group, well-facilitated activity as part of the opening (such as world café activity) establishes the IAF “interactive culture” from the very beginning.

**Closing.** A successful closing plenary is celebrative, participative and powerful, bringing an interactive closure to the event and builds high anticipation toward future conferences.

The closing activity provides an excellent opportunity to debrief delegates’ experience of the conference in small groups as well as **briefly** recognize the volunteers and sponsors who organized the conference. Organizers of the next year’s conference are introduced to say a few words of invitation.

**Celebrative Evening/Cultural Activities.** The celebrative evening with dinner is an important event with visible fun and extended networking.

The celebrative evening, including dinner, underscores the concept that it is important to celebrate with the facilitator community of practice and to celebrate in a way that honors the profession and the occasion. A fine meal in addition to activities such as local cultural performances and honoring achievements of the year are often among the features of the celebration. Local culture and geography often play a role in the orchestration of the evening. Several conferences include music and dance after dinner; sometimes simultaneous after-dinner events are offered such as improvisation games and dancing in order to avoid catering to a limited set of preferences.

**Methods Exchange and Structured Networking.** Facilitator exchange and networking activities underscore the concept that every participant has something to contribute to the conference not just the workshop facilitators.

- ✓ **Share a Method.** This activity may take on a name complementing the conference theme and can be scheduled at any time during the conference. The activity often involves seating participants at tables of 10 with each person sharing a method of others at the table. The methods are recorded on forms prepared in advance and sometimes compiled and printed in a booklet that is distributed to conference goers later, either in hard or electronic copy
- ✓ **Bird of a Feather.** The intent of this activity has been to provide a structural opportunity

for networking and communication among groups who want to get together informally during the conference. Originally, the mode of operation was to schedule a time over lunch for interest groups to form at tables with various topics posted at the tables. Frequently, country groups would meet to discuss the formation of facilitator networks locally; other groups would gather around topics like “facilitator certification”, “electronic certification”, etc. Care should be taken to tailor any such events for maximum participation, being sensitive that some would prefer to have more time for informal networking among self-forming groups rather than structured time for doing so; others find more opportunity for networking in E-forums rather than at a one-time occasion during the conferences.

### **Facilitated Workshops**

Well-facilitated sessions are the heart of the conference. Participants have indicated that they prefer sessions that demonstrate best-practice facilitation rather than lectures. Conference teams may wish to experiment with short presentation/lecture sessions, such as talking heads, panel discussions and TEDx; but, these should not replace the facilitated sessions.

### **IAF Member Events**

To encourage sign-up of new members and to demonstrate benefits of membership to current and potential members, members-only events are encouraged at IAF conferences. For example, provision should be made for IAF members and potential members to meet members of the global Board and regional team attending the conference. If separate regional meetings are held, the agenda for each meeting is set by the relevant Regional Director.

The purpose of member events is to recognize the value/benefits of the association to members, attract new members and seek members’ views of issues of interest. This could take the form of organizing a special members-only session featuring informal conversation with a panel of experienced facilitators, or include providing hard-copy IAF journals to member conference goers. It is recommended that non-members be given the option to sign-up for membership onsite when enticed by such member-only activities.

### **Pre-Conference Meetings**

Pre-conference meetings are important for planning and communicating with everyone who is running the conference. Schedule pre-conference meetings to review information about the conference location, activities and program. The Local Organizing Committee should also meet with volunteers and key staff/contractors at the conference site prior to the conference.

### **Post-Conference Meetings**

A post-conference meeting held on-site at the end of the conference is an important source of feedback. Meet with your team, key facility staff, and volunteers. This is the opportune time to address the following:

- ✓ What worked well and areas of improvement
- ✓ Compliments and constructive feedback
- ✓ Different approaches for future conferences
- ✓ Celebration of achievement

## Conference Marketing

Conferences planning to publicize their conference should follow the IAF communication and [Social Media Guideline](http://bit.ly/iaf-chapter-comms). See <http://bit.ly/iaf-chapter-comms>

### Creating a Communications Plan

A communications plan is an essential tool for defining your target audience, developing your strategy and meeting your goals. A successful communications plan includes the following:

- ✓ **Goals and Objectives.** Define your goals, what you are trying to accomplish and the outcomes you want to achieve with your communication efforts
- ✓ **Key Messages.** Determine key points and highlights of the conference you want to get across to your target audience
- ✓ **Channels.** Establish a master list of news organizations and media targets to carry your key messages to your target audience. Indicate the expected media coverage

**Materials.** Develop materials to catch the attention of the target audience and to promote conference attendance and buzz

**Schedule.** Decide the timing and frequency of your messaging

***Suggested key moments that should be part of the conference communications plan; and dates provided early to Director for Communications to ensure timely support for these key messages, :***

- o Save the date notification (ca. 10-12 months before the conference)
  - o Call for workshop proposals (ca. 6 months before the conference)
  - o Registration opens (at least 3-4 months before the conference)
  - o Programme published
  - o Registration closes
  - o + additional updates during or after the conference
- ✓ Consider ways to harvest the conference content for the benefit of IAF and its members, such as:  
Post-conference sharing of photos, ideas and methods

- Each conference has to have a dedicated event page or micro-site on [iaf-world.org](http://iaf-world.org) as soon as the date is published. An additional conference website is possible, but not required.
- The conference can be mentioned in all-member emails whenever a key moment (see above) occurs. For that, information needs to be sent to the communications director by the 20th of each month.
- The conference organisers are required to share a list of participants (incl. contact details) with IAF after the conference, so that they can be included in IAF Global's contact database.

### **Managing Media and Attendee Lists**

To reach the right audience, gather and maintain proper contact lists. Start with contact lists from the previous year if available. Consider the following when managing media and attendee lists:

- ✓ Media contacts frequently change. Be sure to update the lists, as many of the contacts' names may no longer be valid
- ✓ Add new attendees to the list as they register
- ✓ IAF conferences that have been approved can use IAF e-Notice service to send e-mails to the entire IAF membership database
- ✓ IAF will not share its mailing lists with third-parties, unless express approval has been given by Director for Communications

### **Communicating in a Crisis**

Before the conference begins, create an emergency response plan that defines who is responsible and what should be done if a crisis occurs. Always respond to the immediate situation, and then contact IAF. Some immediate crisis situations that you may have to handle include:

- ✓ Natural disasters
- ✓ Death of an attendee or speaker
- ✓ Issues with potential negative impact, such as financial improprieties, plagiarism, and inappropriate behavior
- ✓ Epidemic/Outbreak of disease or serious illness
- ✓ Venue closing down/being damaged

## **On-Site Management**

### **On-Site Preparations**

To ensure smooth event management and proper organization of committees, consider the following:

- ✓ Set-up a conference office for staff meetings, phone calls and storage
- ✓ Establish a suitable and well-marked volunteer location (e.g. the registration desk)
- ✓ Do a committee tour of the facility to ensure everyone is familiar with important locations (e.g. session rooms, washrooms)
- ✓ Arrange for walkie-talkies or use of cell phones to allow staff to communicate with each other
- ✓ Ensure staff members are easily identifiable to other staff and attendees
- ✓ Set up information kiosks and message centers for meeting participants. This can be a simple bulletin board or computer station

The preparation of an event flow document can also be very useful to ensure smooth event execution. This document should summarize the dates and times of all event functions and outline the tasks associated with carrying out these functions. Each task should be assigned to a staff member.

### **Monitoring Conference Logistics**

During the conference, the Logistics Committee ensures that the conference is running smoothly. This includes (but is not limited to) the following:

- ✓ Checking room layouts
- ✓ Preparing and distributing facilitation materials
- ✓ Checking audio-visual equipment
- ✓ Presentation quality checks on food and beverage