International Council of Archives

Section on Professional Associations

Conference/Seminar Guidelines

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1. Preface

These Conference/Seminar Guidelines have been prepared by the Section on Professional Associations of the International Council of Archives to help Professional Archival Associations as well as others in organising, planning and developing Conferences/Seminars from a half day workshop for a few attendees to a large conference with thousands of attendees.

These guidelines will be reviewed at regular intervals to reflect the ever changing situations evolving around the planning, organization and coordination of such a premier educational event.

This is not an all-inclusive document, but aims to provide the necessary guidance and information to Conference/Seminar team members who are delegated the ultimate responsibility to build, sustain and make this a successful and profitable event.

The Section on Professional Associations of the International Council on Archives would like to thank all the archival and records management associations as well as all individuals that have provided inputs for these Conference/Seminar Guidelines. Their inputs have been very helpful and have contributed in making these guidelines much more practical and useful.

A special thank you to the members of the Board of the Section on Professional Associations:

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Section 1 -- Introduction

1. Introduction

These guidelines were prepared by the Section on Professional Associations of the International Council of Archives to foster the following pre-requisite:

i) to provide an educational forum for the promotion and advancement of archival management principles, methods and practices to all sectors in communities and countries from around the world;

ii) to encourage full participation at all levels that is, not limited professionally, nationally, internationally or geographically; and

iii) to generate revenues for the ongoing administration of the initiatives of the organizers of such events.

2. Objectives

In general archival conferences/Seminars should have the following objectives:

i) to promote and encourage sharing of information amongst attendees;

ii) to provide attendees with educational sessions and sometimes technological displays encompassing the best and most current information in the field of archival management;

iii) to generate income and/or profits, if allowed by the by-laws of the host Association , as a means to fund future operations and activities of professional associations;

iv) to solicit increasing membership through vigorous promotion of The International Council of Archives aims and goals.

3. Delegation of Authority

The control and management of a Conference/Seminar is with the professional association which can in turn delegate part or the complete organization to a local committee of the Association.

All contracts must be approved and signed by the Director of Conference/Seminar unless delegated otherwise but in all cases you should check the Association constitution. No one else is authorized to make any agreement(s) on behalf of the Association without the written consent of the Director of Conference/Seminar. There must be no misunderstanding regarding this statement. Original signed contract(s) shall be maintained by the Director of Conference/Seminar.

Whenever feasible or possible, it is strongly recommended that the organization of a conference/seminar be contracted out to professional organizers. However, in all cases the scientific or program part should be under the complete control of the Association organizing the event.

Section 2 -- Conference/Seminar Options

While these guidelines cover most situations for the organization of a large conference with thousands of attendees, it is recognized that the organization of a smaller conference or a seminar, even though as important, doesn't require the in-depth details that are provided in this manual. So, to facilitate the search of those organizing a smaller function, we are providing various options with corresponding sections and items in the guidelines that should be considered for each situation. It is also understood that in the organization of a smaller conference/seminar, one person or two rather than a committee would be doing a few or many functions.

1. Small Seminar

This would be attended by less than 100 people and would last for a ½ day or a full day. It is recommended that the following sections and Items be considered:

Section 1	All the section
Section 3	Items 2
Section 6	Items 2a, 2b, 4r, 5e, 5g, 7b, 7j, 8b, 9d, 11a, 11d, 11f
Section 7	Item 5

2. Large Seminar

This would be attended by more than 100 attendees and would last for a ½ day or a full day. It is recommended that the following sections and Items be considered:

Section 1	All the section
Section 3	Items 2
Section 6	Items 2a, 2b, 4r, 5b, 5e, 5g, 5i, 7b, 7j, 8b, 9d, 11a, 11d, 11f
Section 7	Items 4h, 4i, 5
Section 8	Appendix A

3. Small Conference

This would be attended by less than 100 attendees and would last for 2 or more days. It is recommemded that the following sections and Items be considered:

Section 1	All the section
Section 3	Items 1, 2, 4a, 4b, 4c, 4e, 4f
Section 5	Items a, b
Section 6	Items 2a, 2b, 2e, 2f, 2h, 2i, 2j, 2k, 3c, 3d, 3e, 3h, 3m, 4c, 4f, 4k, 4q, 4r, 5b, 5c, 5e, 5g, 5i, 5k, 7b, 7d, 7j, 8b, 8d, 8h, 9d, 11a, 11c, 11d, 11e, 11f
Section 7	Items 2, 4b, 4d, 4h, 4i, 5, 11, 12, 15
Section 8	Appendix A

4. Medium size Conference

This would be attended by 100 to 300 attendees and would last 2 or more days. It is recommended that the following sections and Items be considered:

Section 1	All the section
Section 3	Items 1, 2, 2b, 3, 4a, 4b, 4c, 4e, 4f
Section 5	Items a, b, c, e, g, j, k
Section 6	Items 1, 2a, 2b, 2c, 2e, 2f, 2h, 2i, 2j, 2k, 2l, 3a, 3b, 3c, 3d, 3e, 3h, 3k, 3m, 3q, 4c, 4e, 4f, 4j, 4k, 4m, 4q, 4r, 4s, 5a, 5b, 5c, 5e, 5f, 5g, 5i, 5k, 5l, 5o, 5r, 6b, 6c, 6d, 6e, 6j, 6l, 6p, 6r, 7a, 7b, 7c, 7d, 7e, 7j, 7k, 8b, 8d, 8f, 8g, 8h, 9d, 9e, 9f, 9h, 9j, 10a, 10c, 11a, 11b, 11c, 11d, 11e, 11f, 11g, 11h, 11j
Section 7	Items 1, 2, 3, 4a, 4b, 4c, 4d, 4e, 4g, 4h, 4i, 4j, 4k, 4l, 5, 6a, 6c, 6d, 6e, 6f, 7, 8, 9, 10, 11, 12, 13, 15
Section 8	Appendix A

5. Large Conference

This would be attended by more than 300 attendees and would last 2 or more days. It is recommended that all sections and items be considered.

Section 3 -- Conference/Seminar Sites

1. Site Selection

The site selection shall be determined by the Association organizing the event. However this could be delegated to the organizing committee but the final decision should rest with the Association.

The selection of a convenient and affordable site is often the single most important factor in a successful conference/seminar. When selecting a site the following should be considered: what is the accessibility to the targeted attendees, have conferences been held there recently, any sightseeing opportunities, etc...

2. Conference/Seminar Dates

The Association organizing the event will decide on the dates of the conference/seminar taking into consideration the various factors that could reduce the attendance such as: other conferences/seminars that would attract same attendees, religious and/or traditional holidays, the Association constitution, etc...

3. Selection Process

The process of selecting the site should begin at least three years in advance of the dates the Conference/seminar is to be held, in the case of a large conference. The Association organizing the the event and/or the Director of Conference/seminar, have the responsibility for approving the site and considering sites for future conferences/seminars.

The Association organizing the event or the Director of Conference/seminars begins its selection process by reviewing current trade show magazines, hotel and convention facilities guides, published by market specialists. Certain sites are automatically eliminated, due to their travel distance for attendees. In addition, the many Hotel and Convention Center's Sales Directors frequently contact the Associations or the Director of Conference/seminar to provide updated information about their properties and the availability of dates. The use of Universities facilities, in the off season, is another option that could prove to be quite economical.

4. Site Specifications

A site inspection checklist should be completed for each site visits (sample at **Appendix "A"**). The checklist allows for information gathering on Hotel(s), the Convention Centre and Convention and Visitors Bureau. It provides an overview of the facilities and more.

a) Exhibits/Trade Fair

Exhibitors provide us, not only with a wealth of information about new product lines, but also with additional source of revenues for the Association. Target those Exhibitors that might participate in your conference/seminar at least one year before the event and pay particular attention to potential local Exhibitors.

b) Facilities

For the most part, Hotel facilities in major Cities are more than adequate to hold a conference of a small or large magnitude. By having the greater portion of the attendees grouped in/or adjacent to the Headquarters' hotel or the Convention Centre, the need to provide transportation is non-existent.

The size and number of meeting rooms is an important factor when selecting a site. Conference/seminar attendance projections fluctuate and require that seating be provided for a minimum of attendees who will participate at sessions and luncheon functions.

An important element when selecting a conference/seminar site is a facility that can also handle a trade show (exhibits), if such a show is desired by the organizers, and provide enough flexibility to seat all the expected attendees for luncheon, plenary sessions, opening address or other functions.

There are various additional elements that are reviewed when selecting a Conference/seminar site. These are accessibility by any airlines, trains and taxis to the selected conference site; availability of recreational activities; housing and registration assistance provided by the local Convention Bureau; and sight seeing tours offered by local Travel Agencies.

c) Accommodations/Expectations

The cost associated with the selection of a site for future conferences/seminars is equally important. It shall be noted that within a given city, negotiations between the Association organizing the event or the Director of Conference/seminar and the Hotel(s)/Convention Centre Management are undertaken and decisions are made as to what can be expected from the potential host. Complimentary accommodations, reduced room rates, complimentary VIP transportation, etc., are the most common negotiable items being offered, but one should not be limited to only those. Local tourist organizations could be quite helpful at this stage.

d) Request for Proposal

The Association organizing the event or the Director of Conference/seminar is to prepare and submit a Request for Proposal to selected Cities and requests that potential hotel(s) and/or Convention Centre returns a completed detailed submission by a predetermined date (sample at **Appendix "B"**).

After receiving the submissions, all individual submissions are analyzed to ensure that the minimum criteria are adhered to for further consideration. That is, following the analysis of each proposal, the top three (3) are then scheduled for an on-site visit, if feasible.

The Organizers are to communicate with the selected potential Hotel(s) and/or Convention Centre and make the necessary arrangements to visit the potential sites to view their facilities and obtain additional information which could impact on the decision process. A matrix is then developed to compare and determine which site is the most attractive, effective and cost beneficial for the event.

e) Site Approval

*F*inal approval of any conference site is the responsibility of the Association organizing the event in consultation with the Director of Conference/seminar or the appropriate committee. Once approval is obtained, the Director of Conference/seminar or the appropriate committee is to notify the selected Hotel and/or Convention Centre of the Association's decision(see sample at **Appendix "C")**. All other sites that were being considered are also notified in writing to dissolve any binding agreement which release any tentative reservations that had been booked on our behalf vis-à-vis any of their facilities (see sample at **Appendix "D"**).

f) Formal Agreement

A formal written agreement or contract should be signed between the Association organizing the event and the selected Hotel or Convention Centre, outlining the specific items as listed in the Hotel proposal and the required items for the organizers.

Section 4 -- Conference/Seminar Contingency Plan

1. Contingency Plan

*I*n the event of a natural disaster such as flood, fire, earthquake, etc., in the City which has tentatively been committed for the Conference/seminar, it is important and necessary that the following contingency plan be implemented for precautionary measures:

a) Local Representatives

*T*he Organizers shall confer with the Local representatives; any on-site disaster relief organization's; the designated officials; and representatives of the City's Tourism industry regarding the said disaster, if deemed necessary.

b) Hotel and/or Conference Centre

*T*he Organizers shall communicate with the management of the Hotel(s) and/or Convention Centre to make the necessary arrangements to tour, if feasible, the damaged Conference/seminar site and assess the impact caused by the disaster.

c) Decision

*T*he Organizers shall decide as to whether or not to proceed or postpone the Conference/seminar at the scheduled site.

d) Conference/seminar Attendees

*T*he Organizers shall provide in writing to each registrant information regarding the disaster and advise them whether the event will take place as well as new site and dates.

2. Emergency Measures

*I*n addition to the above the Conference/seminar Team is also expected to adhere to the following instructions as a means to ensure that Conference/seminar attendees are properly directed as to how to vacate the premises for their own safety.

a) Hotel / Convention Centre

i. *T*he Organizers shall be cognizant of the emergency plans of the Hotel(s) and Convention Centre facilities.

ii. *T*he Committee Chairpersons shall be familiar with the Hotel(s) and Convention Centre floor plans, especially the Exit doors to ensure conference/seminar attendees security.

iii. *T*he Organizers shall designate an off-site location in the vicinity of the Hotel(s) and/or Convention Centre where Committee Chairperson's would be instructed to meet immediately in case of a major crisis requiring immediate attention.

b) Registration Funds

i. *T*he Registration Chairperson and/or Treasurer shall immediately be responsible to gather all moneys, cheques and valuables and ensure that they are properly safeguarded off-site.

3. Cancellation of Event Insurance Policy

A "**Cancellation of Event Insurance Policy**" shall be purchased, if and when feasible, to cover the loss of revenue due to cancellation, interruption, postponement, or failure to vacate the premises in the event caused by circumstances beyond control of the Association organizing the event such as, earthquake, adverse weather, judicial injunctions, labour strikes, etc. This insurance policy should also cover additional expenses that would be necessary to re-schedule or postpone the Conference/seminar for no more than sixty (60) days. The Insurance Policy should be considered mostly for a large conference.

Section 5 -- Conference/Seminar Structure

1. Organizing Association

The organizing Association through its President has the complete authority for organizing the event. However, the President will usually delegate all or part of this authority to a Director of Conference/seminar, who in turn will form a committe to help him (her) organize the event. The organizing Association should also ensure the availability of a lawyer to advise and/or represent the Association should legal problems be encountered with participants

For the smooth operation of the Conference/seminar, it is imperative that all Team members involved in the planning, organization and presentation of this premier educational event become familiar with their duties and responsibilities.

The Conference/seminar Organizing Committee could be composed of the following optional positions and replacements, appointed by the Association organizing the event to ensure continuity in the planning, organization, control and administration of the conference/seminar.

President
Director of Conference/seminar
Program Chairperson
Conference/Seminar Marketing Chairperson
Local Arrangements Chairperson
Exhibits Chairperson
Registration Chairperson
Special Arrangements Chairperson
Local Marketing Chairperson
Treasurer
Secretary

a) President

The President of the association organizing the event shall be the ultimate authority in all matters relating to the Conference. He (she) is responsible for appointing an organizing committee and a Director of Conference/seminar.

b) Director of Conference/seminar of the Organizing Committee

The Director of Conference/seminar reports directly to the President of the Association and is delegated the planning, organizing, controlling and administration of the conference/seminar. He (she) is also responsible for the appointment of other committee members (positions).

c) Program Chairperson

The Program Chairperson reports directly to the President of the Association organizing the event or the Director of Conference/seminar and is delegated the responsibility of gathering the most impressive group of speakers to give presentations at all levels in the Archival field.

d) Conference/Seminar Marketing Chairperson

The Conference/Seminar Marketing Chairperson reports directly to the Director of Conference/seminar and is delegated the responsibility of professionally developing and overseeing the production of all conference material; of coordinating post-conference advertising throughout the Archival communities; and of coordinating publicity and paid advertising campaigns initiated by the Public Relations Chairperson.

e) Local Arrangements Chairperson

The Local Arrangements Chairperson reports directly to the Director of Conference/seminar and is responsible for all Hotel(s) and Convention Centre logistics, including events such as, Theme Night, Awards Banquet, etc.

f) Exhibit Chairperson

The Exhibit Chairperson reports directly to the Director of Conference/seminar and is responsible for planning and organizing the Conference/seminar trade show and for soliciting consultants, suppliers/vendors and service oriented organizations to introduce stimulating state of the art technological displays and informative presentations.

g) Registration Chairperson

The Registration Chairperson reports directly to the Director of Conference/seminar and is responsible for planning and organizing the activities involved with the registration of Conference/seminar attendees, the sending of confirmation letters, the collection of registration fees (this could be done as well by the Treasurer), and the provision of registration/information packages.

h) Special Arrangements Chairperson

The Special Arrangements Chairperson reports directly to the Director of Conference/seminar and is responsible for the purchase of speaker gifts; the canvassing of donations; the hiring of an official photographer; and the provision of tourist information and attractions

I) Local Marketing Chairperson

The Local Marketing Chairperson reports directly to the Director of Conference/seminar is responsible for advertising and promoting the Conference/seminar within the City through multi-mailings, news releases and special publicity bulletins in conjunction with the Marketing Chairperson. The incumbent is also required to perform solicitation of paid ads from suppliers/vendors for inclusion in the "Program Brochure and "Proceeding" manual.

j) Secretary

The Secretary reports directly to the Director of Conference/seminar and is responsible for taking the minutes at all meetings, gathering and assembling progress reports from the various committees and forwarding them to the Director of Conference/seminar.

k) Treasurer

The Treasurer reports directly to the Director of Conference/seminar and is responsible for all financial matters which involves the control, disbursement and collection of funds; the preparation of financial reports; and the issuing of receipts and invoices to attendees.

Note: The duties and responsibilities of individual positions/officers are described in further detail under **Section 6 -- Duties and Responsibilities**.

Section 6 -- Duties and Responsibilities

1. Director of Conference/seminar

The Director of Conference/seminar has the responsibility of directing and overseeing the efforts of the entire Conference/seminar Team members within the policies set forth. This includes budget planning, specific policy decisions, setting up and monitoring time schedules and ensuring that the goals of the conference/seminar are met. The incumbent is also responsible for:

a) reporting to the President of the Association on all administrative and financial matters relating to the Conference/seminar;

b) negotiating and signing (if this has been delegated by the President of the Association), the pertinent contractual agreements with Hotel(s) and Convention Centre in accordance with pre-defined conference/seminar requirements and specifications;

c) providing the Conference/seminar team members with a "Schedule of Activities" with set deadlines (sample at **Appendix "E"**);

d) approving contractual arrangements pertaining to entertainment and printing services;

e) approving the Conference/seminar program in concert with the President of the Association, as recommended by the Program Chairperson;

f) approving any planned social activities in consultation with the President of the Association, as recommended by the Arrangements Chairperson;

g) approving content, layout and quantity of all "Printed Material" such as, the Advance Flyer, Program Brochure, Proceedings, Banquet Menu, etc., prior to printing, as prepared by the Marketing Chairperson;

h) approving "Keynote Speaker" in consultation with the President of the Association, as recommended by the Program Chairperson;

i) recommending the allocation of complimentary rooms to the President of the Association;

j) recommending the Conference registration fee structure to the President of the Association;

k) orchestrating the sequence of events for the Opening Ceremonies, the Banquet and the luncheon functions;

l)- determining the "Conference/seminar Proceedings" sale price for non-registrants and process post-conference purchase requests.

m) ensuring that procedures and guidelines are in place to provide adequate health and safety conditions for attendees and committee peoples.

*F*urthermore, the Director of Conference/seminar is also delegated signing authority for on-site Hotel(s) and Convention Centre expenditures.

2. Program Chairperson

The Program Chairperson reports directly to the President of the Association organizing the event or to the Director of Conference/seminar and is delegated the responsibility of gathering the most impressive group of speakers to give presentations at the conference/seminar. The incumbent is responsible for:

a) gathering a committee (team members) to assist and support him (her) in the performance of the various undertakings. The Committee should include members from all areas and/or interest of the profession as well as geographical locations ;

b) liaising with other Conference Chairpersons, as required;

c) initiating, if required, the "Call for Papers" or "Call for Abstracts" a minimum of one year prior to Conference/seminar dates;

d) developing the Conference/seminar program consistent with the Association directions;

e) arranging for speakers to submit abstracts in accordance with the schedule of activities set deadlines;

f) consulting, where necessary and justified, with speakers requiring financial assistance and obtaining formal approval from Director of Conference/seminar;

g) researching, selecting and recommending an Keynote Speaker to the Director of Conference/seminar for approval;

h) structuring date and time frame for all sessions;

i) submiting structured Conference/seminar program to the Director of Conference/seminar for approval;

j) if feasible, arranging for acceptance and thank you letters to be sent to selected and rejected speakers;

k) acquiring speakers biography, sessions summary, audio/visual requirements and if required, a black and white glossy photo (passport size) of each speaker in accordance with schedule of activities set deadlines;

l) notifying Local Arrangements Chairperson of speakers audio/visual requirements

m) providing copy of received speakers biography, sessions summary and, if required, the original black and white glossy photo to be included in program brochure at least seven (7) weeks prior to schedule of activities set deadlines to the Marketing Chairperson;

n) obtaining an original copy of speakers presentation, for inclusion in the "Proceedings Manual" according to prescribed format, either in paper form or diskette, and forward at least seven (7) weeks prior to schedule of activities set deadlines to the Marketing Chairperson;

o) coordinating the "Speakers Room" to welcome and brief speakers on all matters pertaining to their well being, throughout the Conference/seminar;

p) if feasible or necessary, providing a recording secretary to takes the minutes at each session.

q) The Program Committee should meet at least once during the planning stage, if financially feasible. Other discussions may be made either by telephone or written communication. Their responsibility consists of assisting the Program Chairperson with various undertakings required to gather the most impressive group of speakers, such as:

- review of speakers abstract;
- contribute in the selection of topics for presentation;
- selection of speakers to give a presentation designed to cover sessions in a particular format (i.e. lecture, workshop, case study, debate or panel discussion);
- send acceptance letters to selected speakers as well as thank you letters to those who were not chosen to make a presentation;
- request speakers biography, sessions summary, audio/visual requirements and, if required, a black and white glossy photos (passport size) of themselves for inclusion in the Program Brochure;
- participate in the grouping of date and time for selected sessions under each tracks; and finally,
- guardian of the "Speakers Room", welcome and escort speakers to room location on-site monitoring of sessions, including pick-up and review of speaker evaluation and critique forms.

r) **Conference/seminars Brochures and Publications**

The Conference/seminar Brochures and Publications are produced by the Marketing Chairperson in conjunction with the Program Chairperson. They could consist of the Advanced Flyer, Countdowns, Call for Abstracts, Program Brochure, Proceedings Manual, and Banquet Menu.

- **Advanced Flyer**

  The Advanced Flyer is usually devised to provide advance notice to the Archival communities. That is, strategic geographical locations which are believed to attract potential Conference/seminar attendees.

  This medium could be very costly for the potential results and is not necessarily the most effective tool to promote the Conference/seminar. However, it could be considered under certain circumstances.

- **Countdowns**

  The Countdown is the most common means of informing the membership at large and other interested parties of the upcoming Conference/seminar. It consist of an issue per month distributed to other Associations Newsletter Editors' for a period of ten (10) months prior to the Conference/seminar and covers a wide variety of activities pertinent to the event.

  This has proven to be a very effective way to reach most of the intended audience at a minimal cost.

- **Call for Abstracts**

  The Call for Abstracts is a mean of advertising the upcoming Conference/seminar and triggering potential speakers interest to submit a paper for presentation at this premier educational event. Its content should highlight the subject matters to be covered, the speaker specifications, expected formats and formal application to be returned to the Program Chairperson.

Note: When speakers are selected on an invitation basis, there is no need for a "Call for Abstracts".

- **Program Brochure**

  The Program Brochure serves the purpose of introducing the upcoming Conference/seminar program and more to potential attendees. It provides information

that will enable them to select educational sessions, meetings, and other events that are appropriate for their learning needs. In addition, it provides attendees with the required forms to register for the Conference/seminar, make the necessary travel and housing arrangements.

The Program Brochure is distributed at least four (4) months prior to the Conference/seminar month. It is mailed to all Association members and two copies are forwarded to all other targeted Associations. Other copies are also sent to individuals who have made inquiries/requests regarding the Conference/seminar.

- ## Proceedings Manual

*T*he Proceedings Manual is compiled in collaboration with speakers who have agreed that their papers appear in this publication. It should provide participants and practitioners at all level with the opportunity to refer to the multitude of subject matters covered during the current Conference/seminar either as reference or a means to review, assimilate and enhance knowledge and skills. All in all, the manual should outline the inner structures of information gathering, storage, retrieval and archiving; illustrate the fluctuations emerging from new technology; and finally, provide a stimulating outlook on the future of Archival Management.

*T*his publication could be handed out to attendees who have registered for the full registration package. Others can obtain for a nominal fee a copy of this publication. The purchase price is usually determined by the Director of Conference/seminar in consultation with the President of the Association.

- ## Banquet Menu

*T*he Banquet Menu is a commemorative publication used to recognize the recipients of awards in the Archival profession, the continued support of Exhibitors, the dedicated contribution of all Conference/seminar Committee members, and finally, the printing of the gastronomic "Banquet Menu".

3. Conference/Seminar Marketing Chairperson

The Conference/Seminar Marketing Chairperson reports directly to the Director of Conference/seminar and is delegated the responsibility of professionally developing and overseeing the production of all Conference/seminar material; to coordinate post-conference advertising throughout the Archival communities; and of coordinating publicity and paid advertising campaigns initiated by the Public Relations Chairperson. The incumbent is responsible for:

a) gathering a committee (team members) to assist and support him (her) in the performance of the various undertakings;

b) consulting the Director of Conference/seminar regarding required quantity of all printed material;

c) contacting in collaboration with the Public Relations Chairperson various archival suppliers/vendors, consultants and any other firms to solicit paid advertising for inclusion in the "Program" brochure and " Proceeding" manual;

d) obtaining from the Program Chairperson the contents required to produce, if feasible, the "Call for Papers" or "Call for Abstracts" or "Call for Presentations" at least seven (7) weeks prior to set deadline;

e) If feasible, designing, formating and producing the "Call for Papers" or Call for Abstracts" or "Call for Presentations" for approval by the Director of Conference/seminar, prior to printing;

f) overseeing the advertising campaigns initiated by the Public Relations Chairperson, to appear in trade magazines as well as local and regional media, if feasible;

g) overseeing the coordination of Corporate sponsorship;

h) obtaining from the Program Chairperson the contents required to produce the "Advance Flyer" or "Countdowns" at least seven (7) weeks prior to set deadline;

i) designing, formating and producing the "Advance Flyer" and/or "Countdowns" for approval by the Director of Conference/seminar, prior to printing;

j) obtaining from the Program Chairperson the contents required to produce the "Program Brochure" at least seven (7) weeks prior to set deadline;

k) designing, formating and producing the " Program Brochure" including the review of the pull-out "Registration" and "Housing" forms for approval by the Director of Conference/seminar, prior to printing;

l) if necessary, obtaining from the Local Arrangements Chairperson the contents required to produce the Banquet menu at least seven (7) weeks prior to set deadline;

m) If necessary, designing, formating and producing the Banquet menu for approval by the Director of Conference/*seminar, prior to printing;

n) obtaining from the Program Chairperson.the speakers' presentation required to produce the "Program Brochure" at least five (5) weeks prior to set deadline;

o) designing, formating and producing the "Conference/seminar Proceedings" manual for approval by the Director of Conference/seminar, prior to printing;

p) obtaining from the Director of Conference/seminar the required information to produce the variety of event tickets at least five (5) weeks prior to set deadline;

q) designing, formating and producing "tickets" for luncheons, regular or optional events and any social activities being offered at the Conference/seminar for approval by the Director of Conference/seminar, prior to printing;

r) overseeing the production of all printed material and arrange for its appropriate distribution; and finally,

s) arranging and supervising the production of various publicity items (i.e. Conference/seminar Commemorative Pins, etc.).

4. Local Arrangements Chairperson

The Local Arrangements Chairperson reports directly to the Director of Conference/seminar and is responsible for Hotel(s) and Convention Centre logistics, including optional events such as, Theme Night, Banquet, etc.

The appointed incumbent is responsible for:

a) gathering a committee (team members) to assist and support him (her) in the performance of the various undertakings;

b) reviewing all contracts with the Hotel(s)/Convention Centre regarding room requirements for the Conference/seminar;

c) determining size and location of rooms according to type of sessions and/or events in consultation with the Program Chairperson and Director of Conference/seminar;

d) providing the Marketing Chairperson with a room locator for printing and inclusion in the "Registration Package";

e) arranging for Audio/Visual (A/V) equipment requirements in all session and event rooms in consultation with the Program Chairperson;

f) arranging for rooms to hold pre, on site and post-conference/seminar Committee and/or Association meetings and others;

g) arranging for hospitality facilities, including food and beverages, as required;

h) arranging for the receipt, storage and eventual return of all Conference/seminar material (i.e. banners, publications, awards, forms, etc.) to the Association appropriate storage location;

i) If required, determining menu selections for luncheons and banquet;

j) providing the Marketing Chairperson with information concerning the gastronomic content of the menu being served at the Banquet for inclusion in the Banquet menu;

k) arranging for coffee breaks and liaising with Exhibits Chairperson to maximize traffic in exhibit area;

l) if feasible, arranging for social activities in consultation with the Director of Conference/seminar;

m) arranging for "Opening Ceremonies" activities in consultation with the Director of Conference/seminar;

n) arranging for all signage in conjunction with the Conference/seminar program as structured by the Program Chairperson and possibly others;

o) consulting the Director of Conference/seminar for "Head" table arrangements at particular events, if required;

p) designating an individual to coordinate and work with the Audio/Visual Contractor;

q) to providing two "trouble shooters" at all time. These should be individuals who would be knowledgeable about the association, the physical facilities, the organizing committee, etc...;

r) coordinating and monitoring the set-up for all sessions and events, as instructed;

s) arranging for visits to archives and other business or social functions and providing a guide for each function.

t) assisting the Director of Conference/seminarwith any other logistical arrangements.

u) providing an "Inquiry Desk" in the registration area for VIP's, guests, speakers, attendees, spouses and visitors who are seeking information about the Conference/seminar, the City, and more;

v) arranging for proper identification of volunteers/workers.

Note: Provides advice on local activities, transportation, and recommends entertainment, restaurants, etc., to ensure an enjoyable stay for out of town attendees.

5. Exhibit Chairperson

The Exhibit Chairperson reports directly to the Director of Conference/seminar and is responsible for planning and organizing the trade show and canvassing consultants, suppliers/vendors and service oriented organizations to introduce stimulating state of the art technological displays and informative presentations. If a professional firm is hired to organize the exhibit, the Exhibit Chairperson act as the liaison between them and the organizing committee.

The appointed incumbent is responsible for:

a) gathering a committee (team members) to assist and support him (her) in the performance of the various undertakings;

b) designing and producing Exhibitor contracts and packages, including drawing illustrating booth layouts;

c) planing exhibit area, pricing and sale of space and obtaining approval of same from the Director of Conference/seminar;

d) obtaining from Exhibitors signed contracts and deposits for purchase of booth space and collecting the balance amounts prior to set-up date;

e) arranging for on-site equipment and services, as required;

f) arranging for the necessary security of the exhibit area and verifying that insurance coverage is adequate;

g) coordinating in concert with the Program Chairperson to ensure that sufficient time is provided to allow attendees to circulate within the exhibit area and view the displays and informative presentations;

h) arranging with Exhibitors to publicize public access to trade show;

i) providing the Marketing Chairperson with a list of paid Exhibitors for inclusion in the "Program Brochure";

j) preparing a letter and drawing highlighting Exhibitors booth layouts for inclusion in the "Registration Packages" and which will serve to properly direct attendees while circulating within the exhibit area ;

k) *I*n addition the Exhibit Chairperson in collaboration with its Committee team members is also responsible for:

- assisting and participating in the planning, coordinating and managing of the Exhibit facilities;

- inspecting the Exhibit facilities and determining the feasibility of its use;

- recommending to the Director of Conference/seminar the per/booth charges and the deposit and cancellation policy to be applied against the purchase of booth space by Exhibitors;

- negotiating the sale of booth space and location with Exhibitors and obtaining approval in principal from the Director of Conference/seminar, if and when required;

- executing and processing all related signed and approved contracts with participating Exhibitors;

- finalizing arrangements with Exhibitors once the assignment of booth space has been confirmed and providing them with an "Exhibitors Information Package";

Note: The "Exhibitors Information Package" should include scaled booth layout; exhibit data and time schedule; list of equipment and services available; official contractors and suppliers name; schedule of charges; local rules, regulations and licenses as well as shipping and storage charges; publicity and advertising medium with costs; advance registration forms; and hotel reservation forms.

- preparing and initiating a detailed outline of all exhibit requirements that must be implemented in advance prior to set-up of Exhibitors booth(s) and displays to ensure that installation schedules and Exhibitors needs are met;

- providing and maintaining exhibit floor management at all times (i.e. from set-up to dismantling of booths and displays); and finally,

- ensuring that Exhibitors complete an "Exhibitors Evaluation Forms" and that they are gathered and compiled accordingly to assist the Association in improving the development and presentation of future conference/seminar exhibit (trade show) presentations.

6. Registration Chairperson

The Registration Chairperson reports directly to the Director of Conference/seminar and is responsible for planning and organizing the activities involved with the registration of attendees; the sending of confirmation letters; the collection of registration fees (this could be under the responsibility of the Treasurer); and the provision of registration packages.

The appointed incumbent is responsible for:

a) gathering a committee (team members) to assist and support him (her) in the performance of the various undertakings;

b) obtaining or purchasing name tags and tag holders for attendees;

c) arranging for the procurement and preparation of conference/seminar and City information, pamphlets, brochures and giveaways for inclusion in the registration packages;

d) obtaining or purchasing portfolios or pouches or bags to hold conference/seminar and city information, pamphlets, brochures and giveaways;

e) arranging for staffing of "Registration Desk" throughout the duration of the Conference/seminar;

f) maintaining and updating the current computerized registration program and ensuring that it is operational, as well as providing the Registration Desk team members with the necessary training to perform the various key functions required to register on-site attendees;

g) producing an "Attendance Roster" for inclusion in the registration package;

h) assigning at least 2 "Troubleshooters" who will circulate in the registration area at all times to provide assistance to the Committee team members and attendees;

i) providing input in the design of the "Registration Form" for inclusion in the "Program Brochure";

j) sending confirmation letters to Conference/seminar registrants;

k) arranging for the sale of optional event and additional tickets;

l) arranging for the sale and distribution of "Proceedings" manuals to attendees; and

m) arranging for petty cash and cashier to collect on-site registration fees, ticket sales, etc., for pre-registered and walk-in attendees. The cashier shall be appointed by the Treasurer, if he/she is unable to perform such pre-defined task.

7. Special Arrangements Chairperson

The Special Arrangements Chairperson reports directly to the Director of Conference/seminar and is responsible for purchasing gifts for speakers; sponsorships; hiring of an official photographer; and the provision of tourist information and attractions. In all, the Special Arrangements Chairperson supported by the Committee acts as a welcoming team during the Conference/seminar.

The appointed incumbent is responsible for:

a) gathering a committee (team members) to assist and support him (her) in the performance of the various undertakings;

b) arranging for the purchase of speakers' gifts;

c) arranging for an official photographer to take pictures of sessions and events;

d) canvassing local businesses for donations of attendance/door prizes.

e) recommending entertainment for social activities to the Director of Conference/seminar;

f) providing transportation to and from the airport and within the City for VIP's and guests; and

g) gathering brochures, restaurant listings, city maps, handouts for attendees, etc...

8. Local Marketing Chairperson

The Local Marketing Chairperson reports directly to the Director of Conference/seminar and is responsible for advertising and promoting the Conference/seminar through multi-mailings, news releases and special publicity bulletins in conjunction with the Marketing Chairperson. In addition, shall contact suppliers/vendors to solicit paid ads for inclusion in the brochures and publications.

The appointed incumbent is responsible for:

a) gathering a committee (team members) to assist and support him (her) in the performance of the various undertakings;

b) soliciting various local records and information suppliers, consultants and any other firms for paid advertising to be included in the "Program Brochure" and "Proceedings" manual;

c) gathering and devising local mailing lists of potential attendees for advertising purposes within the downtown core and vicinity of the Host City;

d) distributing to all potential attendees appearing on the local mailing lists, any publicity material as well as a personal invitation on behalf of the President of the Association to encourage their active participation;

e) compiling listings of local newspapers, trade magazine/publications, radio and television stations which could be used in the promotion of the Conference/seminar;

f) preparing press releases for dissemination to the press, radio, and television for promoting the event in the City and its surroundings and of which must be cleared by the Marketing Chairperson;

g) preparing special publicity bulletins promoting the merits of the Host City;

h) maintaining a supply of Conference/seminar brochures and publications for distribution locally;

i) arranging with the Special Arrangements Chairperson to have publicity pictures taken before and during the event for use in post-conference/seminar publicity release in accordance with direction provided by the Marketing Chairperson; and

j) arranging for the necessary press conference in conjunction with the Conference/seminar;

k) preparing in concert with the Marketing Chairperson publicity and promotion of the Conference/seminar in time for the circulation and/or distribution at the Association various functions.

9. Secretary

The Secretary reports directly to the Director of Conference/seminar and is responsible for taking the minutes at all meetings, gathering and assembling progress reports from the various Committees and forwarding them to the Director of Conference/seminar and copied to the President of the Association for information purposes.

The appointed incumbent is responsible for:

a) maintaining minutes of all committee meetings;

b) forwarding copies of all Committee meetings to the Director of Conference/seminar and the President of the Association; and

c) assembling and forwarding to the Director of Conference/seminar complete records of all activities carried out by the Committees Chairpersons' within four (4) weeks after the conclusion of the Conference/seminar.

10. Treasurer

The Treasurer reports directly to the Director of Conference/seminar and is responsible for all financial matters which involves the control, disbursement and collection of funds; the preparation of financial reports; and the issuing of receipts and invoices to attendees.

The appointed incumbent is responsible for:

a) controling all incoming funds and disbursements;

b) opening a separate banking account;

c) maintaining all financial records and paying all invoices subsequent to obtaining appropriate approval;

d) arranging for collecting and documenting on-site registration fees as well as providing receipts, if requested;

e) arranging to have receipt included in the registration packages;

f) arranging for the safe-keeping of all moneys collected;

g) providing appropriate input in the budgetary process, if and when required;

h) invoicing attendees, Exhibitors, etc., as required;

i) submiting a monthly financial report at the Committee meetings and to the Director of Conference/seminar; and

j) submiting a full financial report to the Director of Conference/seminar no later than forty five (45) days after the conclusion of the Conference/seminar or as when required to do so under the Association Constitution or financial regulations.

The Treasurer should have signing authority for all Conference/seminar disbursements as per the procedures set out in the constitution of the Association organizing the event. In addition, the Treasurer must also maintain the financial books in such a manner that it will be easy to properly audit and prepare the financial reports that truly reflects revenues and expenditures by activity.

Section 7 -- Logistics

1. Administration

The overall administration of the Conference/seminar is delegated to the Director of Conference/seminar by the President of the Association.

2. Theme

The theme shall be suggested by the Marketing Chairperson. It shall be approved by the President of the Association following recommendations made from the Director of Conference/seminar, the Program Chairperson and Committees Chairpersons. In developing the theme, every effort will be made to support the educational nature of the Conference/seminar and most of all, to relate to the Host City's renowned attractions.

The theme and artwork will be developed as "Clip Art" and provided for use in the marketing efforts.

3. Selection of Speakers

Speakers and session leaders are a major factor in the success of any conference/seminar. They should be selected and invited according to their ability to contribute to the theme, their stature and background in the profession and their speaking competence.

The primary source of speakers could be from within the Association. Other sources include: members of other professional organizations, universities and colleges, government agencies and recommendations made by the Program Committee. The use of supplier/vendor representatives or professional consultants should be kept to a minimum.

Speakers should be invited early, (12)to (18) months in advance of the conference/seminar dates. This is usually initiated by a "Call for Abstracts". The Call for Abstracts provides potential speakers or session leaders with the opportunity to submit a submission for one or several presentations. The submission should describe the speaker or session leader's experience and exposure, the chosen topic and a session synopsis which is to reflect the subject matter to be covered. Speakers are also required to submit synopsis or text, or both, for the Proceedings manual. The Program Chairperson will establish time limits for presentations.

4. Planning

*P*reparation for a conference/seminar should begin as early as possible that is, at least eighteen (18) months prior to Conference/seminar scheduled dates. For large conferences (i.e. 1000 or more attendees) the preparation should start 3 or 4 years prior to the scheduled dates. The Director of Conference/seminar will meet with all Chairpersons at least fifteen (15) months prior to the scheduled dates to discuss and initiate all aspect of their involvement.

*T*he following is a general outline describing some of the issues to be considered in the preparation of a Conference/seminar. Many of these subjects are addressed in further detail within these guidelines:

a) *W*hile establishing the budget, the Director of Conference/seminar in consultation with the President of the Association are to consider what is the maximum fee that can be charged, expected profit margin, etc., then determine final fee structure based on established costs and desired results;

b) *T*he Director of Conference/seminar is to gather a group of individuals who will serve as Chairperson of committees. The selection criteria of such individuals must require that they have in the past demonstrated their abilities and most of all, indicated a keen interest in taking an active part in such an event. It is important that these energetic people be involved in all the activities involved with the Conference/seminar planning. They should also be representative of all levels of the profession as well as geographical locations;

c) *T*he brochures and publications must be devised in accordance with the established theme and all marketing information used to publicize such an event must be complete and accurate to eliminate unnecessary inquiries;

d) *A*ppropriate mailing lists must be established for pre-publicity and distribution of brochures and publications;

e) *A* brochure with a covering letter must be forwarded to the selected speakers. The covering letter should define requirements such as transportation, facilities, A/V equipment, etc.;

F) *S*everal weeks prior to Conference/seminar dates, telephone each individual speakers to confirm their commitment, A/V equipment, travel arrangements, and any other details;

g) *T*he Hotel(s) and/or Convention Center Management must be contacted to ensure that all meeting and facility arrangements previously agreed upon have been carried out;

h) *N*ame tags, tag holders and portfolios/pouches or bags must be obtained or purchased for attendees;

i) *A*ll rooms must be verified beforehand to ensure that adequate lighting, heat, and ventilation are available;

j) *I*t is essential that session and Conference/seminar evaluation forms be gathered from attendees and returned for evaluation by the assigned Committee;

k) *P*ersonal thank you letters must be written and sent to all speakers and Committee members; and

l) *A* final report must be compiled outlining the procedures followed in planning the Conference/seminar. This should be completed by all Committees, thus ensuring continued success in future conference/seminar planning.

*T*he above are matters of some importance that will contribute to the provision of a first class premier educational event as well as ensuring that attendees are cordially welcomed, attended to and given what they expect, thus providing them with an extreme feeling of self-achievement and satisfaction which will further encourage their attendance in future conferences/seminar.

5. Checklist

*T*he following checklist will contribute to a consistent operation in the planning process of a conference/seminar.

*T*hings to do....

- ¤ Update computer program for conference/seminar registration.
- ¤ Obtain and pre-arrange material for stuffing conference/seminar bags.
- ¤ Arrange for pick-up of waste in meeting rooms, speaker ready room, registration area, etc.
- ¤ Arrange for a convenient photocopier with necessary supplies and sufficient bond paper, not to mention equipment repairs, if and when required.
- ¤ Arrange for sufficient tables, seating and work space in "Speaker Ready Room.
- ¤ Devise a list of key Conference/seminar and Hotel(s) and Convention Centre telephone numbers for distribution to all Committee members.
- ¤ Obtain the necessary number of two way radios for distribution to key Committee members.
- ¤ Prepare last minute signs.
- ¤ Prepare list of emergency telephone numbers for calls to attendees and insert in registration package.
- ¤ If feasible, arrange for coffee, muffins and/or donuts as well as soft drinks for early morning, mid morning and afternoon breaks in "Speakers Room".
- ¤ If feasible, arrange for a light lunch to be served in the "Speakers Room" for some or all Committee members.
- ¤ Ensure that appropriate equipment and supplies are available and in adequate quantities (see sample list at **Appendix G**).

*F*urthermore, there are other significant elements which must be considered in the planning stage of a conference/seminar to ensure its success.

* Audio/Visual Equipment
* Budget Preparation
* Conference Brochure
* Conference Countdowns
* Confirmation Letters
* Evaluation/Critique Sheets
* Exhibits/Vendors
* Flyers
* Food and Beverages
  - Coffee/Soft Drinks
  - Luncheons
  - Banquet
* Hotel Bookings
  - Speakers
  - Registrants
* List of Registrants
* Mailing Lists
* Organized Tours
* Photographer
* Profit and Loss Statement
* Registration Form
* Registration Package for Attendees
  - Pencils/Pens
  - Pads/Notebooks
  - Name Tags/Tag Holders
  - City Map
  - Brochures on Sites and Tours
* Site Selection
* Speaker Contacts/Gifts
* Time Schedule
* Thank you Letters
* Topic/Program Selection
* Transportation
  - To and From Airport
  - Inter-City Tours

6. Facilities and Accessories

*I*rrespective of variation in locale, there are a certain number of basic facilities and accessories required to ensure the adequate functionality of the Conference/seminar. These are as follows:

a) Hotel(s)

- *R*easonably priced accommodation with adequate space for exhibits should Convention Centre facilities not be available.
- *E*xhibits insurance and security can be additional expenses, if held in a hotel.
- *M*eeting rooms, in an Hotel, will normally be provided at no costs based on the condition that the number of bedrooms blocked at the Headquarter's Hotel are occupied.
- *C*omplimentary bedrooms on a ratio of 50/1 is usually the standard offered by Hotels.
- *C*ut-off date for room reservations should be as late as possible.

b) Convention Centre

- *T*he use of a Convention Centre is optional and involves a trade-off between potentially free session rooms and a charge for all materials, versus the provision of professional staff and varying amounts of on-site equipment which are included according to specific locations.
- *S*ecurity features are normally supplied with a Convention Centre while catering is to be negotiated separately.

c) Session and Associated Rooms

- *A* room with the necessary equipment shall be allocated for each track with an appropriate seating capacity. Seating arrangements be in a U shaped, Hallow square, Classroom or in a theater style unless otherwise specified by the Program Chairperson.

- *An* administration/speaker room shall be located in the immediate vicinity of the session rooms and shall constitute the "Speakers Room" for the Conference. Working tables and chairs shall be provided for the Director of Conference/seminar, as well as for other Chairpersons if needed.

d) Audio/Visual Equipment

- *If* not provided by a Convention Centre, or if no Convention Centre is used/available, it will be necessary to contact a local supplier for the provision of audio/visual equipment. This could consist of a 35mm Slide Projector, an Overhead Projector, Projection Screen, and Flip Charts for each session room for the duration of the Conference/seminar.

- *O*ther equipment such as Sayer Computer Projectors, Video Tape Decks, and Monitors should be acquired according to information justifying the need and provided by the Program Chairperson who will make the final decision as these could be very expensive to rent. A podium microphone should be installed in session rooms with alternate voice amplification systems if and when requested by the Program Chairperson.

e) Communications Equipment

- *T*wo way radios shall be provided for the key Chairpersons, the Speakers Room, the Registration Desk, and the Convention Centre Coordinator or Hotel Conference Manager. An additional (spare) one shall be retained in case of radio malfunctions. Two way radio chargers shall be supplied and the Local Arrangements Chairperson shall ensure that radios are returned at the end of each day. Also other electronic equipment, video conferencing, or internet could be considered if feasible and/or appropriate.

f) Evaluation

- *S*ession Evaluation forms shall be distributed at every session.
- *O*verall Conference/seminar Evaluation forms shall be distributed at the first session of the last Conference/seminar day.
- *S*ession and Conference/seminar Evaluation forms shall be gathered and forwarded to the Program Chairperson for overall assessment and reporting to the Director of Conference/seminar.

7. Schedule of Activities

*S*ince each conference/seminar is to be planned at least eighteen (18) months prior to scheduled dates, the schedule of activities establish a definite timetable which shall consider everything that needs to be done from the pre-conference/seminar events to the Conference/seminar dates and finally to post-conference/seminar events. It is imperative to provide the Committee Chairpersons with a timetable of those activities which forms part of their portfolio. By doing so, each team members will be given the direction as to what activities require immediate action (sample at **Appendix "E"**).

8. Program Planning

*T*he ultimate success of any conference/seminar and the projection of a dynamic association image is attained primarily through effective programming. It is the key element in the enhancement of Conference/seminar reputation as the premier educational event for Archival Professionals. It should be carefully developed with a positive theme and the best speakers available on the market. Program planning should be initiated at least one year before the scheduled Conference/seminar dates.