Planning and Organizing a Conference

with ITAA

CONFERENCE MANUAL

Revised 2019-2020

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1. Overview

1.1 Purpose of this Manual

Every conference will have its own flavour, size and uniqueness. There are many factors, including language, culture, location, availability of funds, participant mix, the conference theme, etc. each contributing delicately to how a conference finally comes together.

Many of us have collaborated to make this manual possible, each with ample experiences in having been an integral part of running and supporting ITAA and Regional conferences.

The Conference Manual has been written so as to provide a comprehensive repository of information, as well as a reliable structure and guide for conference organisers to maximise success. It needs to be periodically updated to include emerging trends, views and experience.

Despite having had a guide and templates offered to us, we had our share of smooth, as well as challenging experiences, which have sprung up along the way. Each organiser is invited to 'do it their own way' since each conference deserves a unique character and identity of its own.

1.2 Why TA Conferences

- Connect and reconnect with TA folks across the globe
- Networking, meeting others and feel a sense of belonging
- Build Membership and Community building
- Expand and Strengthen TA knowledge and application
- Present expertise and research
- Increase of professional currency
- Exchange of ideas, new thinking and perspectives
- Invite new members interested in TA, promote TA
- A place for holding important events: IBOC exams, ITAA AGM, etc.

2. The ITAA Conference Policy and Guidelines

The Conference policy states the frequency of ITAA conferences. An ITAA conference will be held once every 3 years.

Every three years we will have an ITAA conference, every three years, a World conference and every three years, the ITAA will support a national/regional conference.
Benefits of this schedule are:

• The reduction of stress in finding locations willing to host a global event
• Lessening burden of a small group of people on one big global event
• Spread TA globally
• Bringing in TA talent from examinees/Board members/ITAA members to locations they might not consider traveling without this support
• Minimizes the possibility of the burden of potential financial loss on the ITAA
• Allows the TA Community to continue offering education service every year to the ITAA members
• Offers a place for the Board of Trustees meeting as well as the ITAA AGM
• Reaches out to smaller pockets of TA talent, inviting them to serve with the larger TA organization, potentially beneficially increasing our diversity of talents and interests and our team of active members

2.1 Table showing the indicative Conference Schedule

The ITAA Conference every 3 years; World TA Conference every 3 years; Regional/National Conference every 3 years

Table consisting of indicative list of Conferences over the next 2 decades			
Year	**Conference Type**	**Location**	**Confirmed/ yet to decide**
2020	World	Birmingham	Cancelled due to Covid Pandemic
2021	ITAA	South Korea	Cancelled due to Covid Pandemic
2022	Supported		Yet to decide
2023	World		Yet to decide
2024	ITAA		Yet to decide
2025	Supported		Yet to decide

2.2 Offers and conditions for all ITAA Conference Hosts

- Marketing services that we offer during a "support" year:
    - o Hosts have the ITAA designated conference status.
    - o Articles and information published in The Script
    - o ITAA Website graphic and link to conference website
    - o Relevant mail support, as outlined in the ITAA email policy
- ITAA will add value to the conference by paying for the ITAA exams at that location and by paying for Board member travel to the conference (subject to availability and approval by the ITAA Treasurer), which will encourage international presenters if there is interest in having them.
- Process of identifying and selecting a local/regional/national conference to support. Priority will go to national/regional/similar conferences:
    - o Which offer relative ease of travel
    - o Have more potential examinees in their area
    - o Communicate an organized conference plan, contract and theme
    - o Not located in Europe, due to the agreement to host TA World conferences only in European countries
- **Conference Location**: ITAA agrees to cohost TA World conferences only in Europe, as is wished by EATA The ITAA agreed that World conferences in European countries performed better. This imbalance can be fixed by prioritizing "supported" conferences in non-European countries.
- **Seed Money and Profit Sharing**:
  The ITAA is a non-profit organization and will benefit from any support from its members and regional/national organisations. The points mentioned below invite profit sharing to support the ITAA financially as much as possible. The ITAA will provide maximum support possible for the success of a designated ITAA Conference.
    - The Profit sharing for s designated ITAA Conferences will be in the region of 70% to the Organisers and 30%to the ITAA. No Seed Money will be provided by the ITAA. Support will be in the form of a conference link on ITAA Website as well as monthly conference updates in The Script. The Conference fees for the ITAA BOT will be waived by the Conference Organisers.
    - For supported Regional / National Conferences, the seed money and profit sharing will be flexible, depending on the where the conference is being held. ITAA will not be liable for sharing of any losses that may arise. The Conference fees for 3 or more members of the ITAA BOT will be waived by the Conference Organisers.
    - The World Conference, policy will be updated post discussions with the 3 associations involved: ITAA, EATA, FTAA.

2.3 General Points for all Conferences

2.3.1 Awards:

Awards are ideally to be presented in the plenary of any conference, to ensure that the awardees have their work and contribution to the ITAA and the world-wide TA community adequately recognized.   In case of situations where all the awards cannot be presented at the plenary, at least the EBMA and the Research award for the year needs to be presented at a plenary early in the Conference.

2.3.2 Managing Emergency Situations

- Managing emergency situations involving natural disasters, political situations, pandemics, epidemics and any other unforeseen situations becomes extremely important for conference organizers to consider.
- The Conference team learned valuable lessons from their experiences. Conference organizers and the Steering Committee can benefit from these lessons by discussing:
    o What worked?
    o Why?
    o What didn't work?
    o What can be done instead?

- Consider, at the time of conference planning, risk involved in travel to and residing in the location.
    o Search for travel advisories to the area.
    o Consider the acceptance of Western thinking and TA ideas.

- Create an electronic back-up plan for the Board meeting and AGM meeting.
- Create a back-up plan for exams, which might include relocating, rescheduling, and refunding exam fees.
- Organisers can explore options for a Hybrid or pure online conference. Please refer to Section 4 of this manual for additional

3. Past ITAA, World, ITAA Supported Regional Conferences – History

Year	Business Meeting (Winter Congress)	Attendance	Annual Conference	Attendance
1986	Orlando, Florida Court of Flags	166	San Francisco, California Cathedral Hill Hotel	450
1987	Singapore Westin Hotel	278	Chicago, Illinois Westin Hotel	351
1988	San Diego, California Bahia Hotel	177	Rio de Janeiro, Brazil Hotel Nacional	549
1989	Honolulu, Hawaii Hawaiian Regent	203	Oakland, California Hyatt Hotel	326
1990	Oaxtepec, Mexico Oaxtepec Resort	386	Brusssels, Belgium Sheraton Hotel	600
1991	Mississauga, Canada Ramada	172	Stamford, CT Sheraton Hotel	300
1992	Brighton, UK Hotel Metropole	200	Auckland, New Zealand* Waipuna Hotel	225
1193	Cochin, India	300	Minneapolis, MN	335
1194	Nurnburg, Germany	700	Aruba, Du. Caribbean Aruba Caribbean	250
1995	Singapore Pan Pacific Hotel	240	San Francisco, CA Nikko Hotel	525
1996	Amsterdam, Netherlands	100	Calgary, Canada Sheraton Hotel	300
1997	Coimbatore, India Hotel Surya International	425	Caracas, Venezuela Hotel Tamanaco Intercontinental	400
1998	Philadelphia, Pennsylvania	100	Zurich, Switzerland (Co-sponsor EATA)	800
1999	Maui, Hawaii	250	San Francisco, CA	525
2000	Halifax, Nova Scotia Canada			216
2001	Sydney, Australia			120
2002	Utrecht, Netherlands			342
2003	Oaxaca, Mexico			252

2004	Bangalore, India	360
2005	Edinburgh, UK	850
2006	Istanbul, Turkey	193
2007	San Francisco, Westin Hotel SFO Airport, TAWC?	330
2008	Johannesburg, South Africa, TAWC	200
2009	Lima, Peru	200
2010	Montreal, Canada	400
2011	Bilbao, Spain, TAWC	504
2012	Chennai, India	250
2013	Osaka, Japan	650
2014	San Francisco, Marriott Waterfront Hotel, TAWC	340
2015	Sydney, Australia	223
2016	SAATA Conference supported by ITAA, Coimbatore, India	163
2017	Berlin, Germany, TAWC	1005
2018	Kochi, India	127
2019	Raleigh, North Carolina, USA, Marriott City Centre co-sponsored with USATAA and Southeast Institute	175
2020	Birmingham, UK, TAWC	Cancelled due to CoVid Pandemic
2021	South Korea	Cancelled due to CoVid Pandemic

4. Online and Hybrid formats of ITAA Conferences

Online and Hybrid formats of ITAA Conferences

Online/ Hybrid formats are possible options in the event of natural and political disasters. The traditional format of ITAA conferences with traveling and meeting delegates from different countries may become too risky in new realities. Online / Hybrid formats also minimize financial risks for the ITAA.

ITAA ONLINE conference.
One option is that it is purely an ITAA event and doesn't need any host association and venue. It is especially suitable while risks due to pandemic or other natural disasters are high and there is no local association willing to take a risk of hosting an ITAA conference. Local associations can be invited to organize translation for their members, if needed.

Advantages:
- It doesn't depend on traveling and physically meeting delegates and can be run even in situations of full lock-downs.
- Expenses involved to organize a conference are much lower than for the traditional format. There are no expenses required for venue, accommodation and travel of presenters, services for delegates on site, etc.
- They can be organized by a small organizing group in a rather short time.
- They can happen more often than once a year. Dates and duration of such events can be flexible.
- Conference fees can be reasonable for delegates. Delegates are completely spared of costs for visa, accommodation, travel, etc.
- Translation to many languages by local TA associations is possible, for those who agree to take care of it for their members.
- Many people who usually don't participate due to high expenses, not being fluent in the English language, not wishing to travel, etc. can opt to join.
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Disadvantages:
- Many participants attend TA conferences to physically meet and network with their colleagues and friends at onsite conferences. This is unavailable in this format and may be a dissuading factor for some who may not opt to attend.
- Presenters need to rework their power-point presentation to an online format. Some of the topics can present challenges in this format. e.g. bodily contact practices.
- Exams and TEW in their existing format will need to be explored and tested for online formats. BOT meetings need to be run online.
- Possible technical errors.

Supported Local Association HYBRID conference.
A local TA Association runs a conference in traditional physical meeting format that is also available online for ITAA members from other countries. Delegates who can travel join and participate physically, while others participate online.

There can by a number of ways to run this type of conference:
- **Full interactive hybrid format.** Video from all plenary and conference rooms is streamed. Participants who meet in the conference room are participating physically; others are presented on the screen and can ask questions, participate in exercises, etc.
- **Video from conference rooms is streamed.** Participants who meet in the conference room are participating physically; others are following in real time without an opportunity for active participation. They can ask questions later in written form to presenters, if both agree.
- **Video from conference rooms is recorded.** Similar to the previous format. The recorded conference for online participants is translated later at a convenient time, taking into account the time difference.
- **Plenary sessions only are streamed or recorded.** This doesn't give a full impression of conference, but can be valuable for many people who can't come to the conference physically. This format will not burden "live" participants by a sense of participating in a "show".

Advantages:

These formats combine all opportunities for delegates who can travel and meet physically and an opportunity of some participation for those who cannot travel. If the situation for travelling improves, participants can change from an online to the onsite format and the conference can proceed in the original onsite format.

Disadvantages:

Organizational work and expenses involved are higher and more complex than for traditional conference formats.

The conference venue will need to be really sound technically for video streaming, internet connection, etc.

Some formats of a hybrid conference can create inconveniences to "live" participants and to presenters and can raise issues in the area of confidentiality, etc.

Potentially high possibility of technical challenges.

TA World Conference (TAWC)

The existing TAWC in its current format can present substantial financial and other risks and challenges for all three associations. This format will need to be relooked at and renegotiated through a combined discussion with EATA, ITAA and FTAA, the mutually responsible parties. .

5. Hosting of an ITAA Committee

5.1 Aspects to Consider for Hosting a Conference

The key to a good conference is a well-organized, fully staffed Host Committee. If a group of you has decided that you would like to see an ITAA conference take place in your country or town this will be the core of the Host Committee, Assemble a local planning committee and begin to meet to discuss the conference. Talk to the President of ITAA or make a proposal to the Board of Trustees (BOT) about your readiness to host a conference.

Eventually you will have to make a proposal. The proposal should include the names of the Host Committee and if possible, who will be in charge of what function. There should be one Chair, one Treasurer and several Sub-Committee Chairs; Venue, Program, Social Program, Publicity, Volunteer Coordinator, Internet and Logistics.

Duties: It is best if every one of these functions is taken up by a different person; although, several functions can be assigned to one person if necessary.

Conference Chair: The Chair will need executive skills, a good knowledge of the organization and of those members chosen to work together. A sense of humor is a considerable asset as is a "cool" approach to problem solving. The Chair oversees and is ultimately responsible for the choice and scheduling of all events and for the publication of the program booklet, BOT meetings, pre-conference institutes, opening and closing events, plenary panels, conference presentations and workshops, banquet, dance, support groups, and pre-and post-conference tours which have to be planned and coordinated, Continuing Education Credits have to be administered and it's the Chair's job to make sure that all this is done correctly.

Treasurer: This person makes up a budget, (see chapter 5) and opens up a conference checking account, keeps track of expenses, pay bills and collects income from conference registrations. The Treasurer may work closely with another person who acts as registrar. The Treasurer writes a final profit/loss report, dispenses funds, and closes the conference checking account. The profit/loss split is determined by the written contract between the ITAA and the conference organizers.

The Venue Chair: is the liaison between the Host Committee and the Venue's representatives, and is responsible to oversee accommodation arrangements, make sure that sufficient meeting rooms of appropriate size are available, and arrange for refreshments during breaks and arrangements for the banquet. This job is key; the contract with the venue (if the venue is a hotel) will include such diverse parts as how much coffee for breaks, and how many rooms for large and small group presentations.

The Scientific Program Chair: is responsible for the choice of presenters, writing a call for proposals, seeking out current topics to make the program timely, evaluating proposals and choosing presenters, sending out acceptance letters and contracts, scheduling presentations, and choosing appropriate rooms for each presentation.

The Social Program Chair: is responsible for the planning and organization of all social events; the opening ceremony and party, award ceremonies, banquet, dance, closing ceremony and any other social events as well as choosing of moderators and music groups. The Social PC makes sure that conference workers and volunteers are properly publicly thanked and makes sure that there is at least one picture of Eric Berne prominently displayed at the proceedings. The Connector area, Hospitality Room, banquets and buffets, dances, a children's or youth program, optional tours and entertainments, support groups, men's and women's caucuses, Message Board, are typical offerings in the social program.

The Publicity Chair: is responsible for the public relations of the conference and oversees public service announcements, should be prepared to send to local radio, TV and newspapers. If posters have been developed, develop a list of organization or groups for distribution. Develop ads for publication,

to be published 9, 6, 3 months and 4 and 2 weeks ahead of the conference. Coordinate with editors of *Script* and *TAJ* for the placement of announcements. Coordinate with ITAA Webmaster to publicize conference, (see Chapter 5) Arrange interviews on local TV and radio stations for the keynote speakers or local ITAA members.

The Internet Chair: The Internet Chair arranges for the establishment of a conference web page; hires a web master and coordinates the contents of the web page with the different Chairs so as to include on line registration, room reservation, on line call for papers and the publication of events and presentations as they are secured. The Internet Chair surfs the web page and updates it regularly publishes the pertinent e-mail addresses of the several Chairs so that questions can be addressed and answered on line. The ITAA keeps a record of several conferences' web pages as well as this manual to be used as references on ITAA website.

Apparatus/Logistics Chair: This is a job for a person who has a fine eye for detail. Setting up registration the day of the conference takes a team of people, for example about 6 – 8 people depending on the size of conference registration. About two at the front desk; about four are available to run errands, find audio visual equipment, run interference on problems that arise. Sometimes, the people at the front desk meet newcomers from out of the country who are dazed and disoriented and need anchoring. Often this group is faced with handling several problems at one time.

Volunteer Coordinator: Involves as many volunteers as possible. Look for volunteers to help staff the registration table, introduce speakers, be on hand at the connector room, greet new comers decorate for the banquet, and help maintain order at social events (such as the banquet). Often volunteers are given a break on their registration fee because they offer their time and efforts. The volunteer coordinator should locate 12-15 people to help out.

Some Thoughts about Morale: Running a conference can be a daunting task. There will be anxiety about success in attracting attendees and raising sufficient funds. There will be conflicts about who shall present and what. As the conference proceeds there will be complaints and far fewer compliments; that is normal and must be endured with good cheer. Good morale is a quality of ITAA conferences because of the general attitude about strokes and friendly OK/OK relations. One of the Chair's jobs is to maintain good morale by being positive, resolving conflicts and giving constructive criticism as well as strokes.

5.2 Conference Proposal Outline

1. Please tell us what your Vision for this conference is; why it should happen in your town/country, what its theme would be and why your group is capable of organizing it successfully.

2. Proposed Conference Dates:

3. Proposed Conference Chairperson. Qualifications

4. Who would be Conference Committee Members and what functions would they perform? Qualifications

5. What are your proposed housing plans (including low cost) and venues? Brief descriptions?

6. Who would be your attendees?

7. What is your Marketing-Promotion Plan?

8. What is your Transportation Plan to city and to venue? Air travel to and from major cities? Train and bus lines? Other transportation?

9. Conference Budget (Proposed Income/Expense Balance Sheet)
    ☐ Hotel space and reservation costs, deposits, etc.:

    ☐ Advertising estimates:

    ☐ Committee expenses:

    ☐ Program production expenses:

    ☐ Proposed conference fee structure:

    ☐ Estimated # of registrants to recoup expenses:

    ☐ Requested "seed money" from ITAA and other host organizations.

10. Time Lines (Example: For deposits for hotel, meeting rooms. Your deadline for go ahead)

11. Phone, Mailing Addresses, E-mail: _____

5.3 Important Conference (Host Committee) Timeline

4 Years Out_____ *Submit Tentative Proposal:* Talk to President of ITAA or make a proposal at a Board of Trustees (BOT) meeting about a possible conference in your town or country.

Feasibility Study: How many local volunteers are available to do the work required to put on a conference (At least 10 people)? How many local participants might attend? How many international delegates might realistically be expected to attend? What impact would the local economy and interest in TA have on the ability to put on a profitable conference? Make a tentative budget.

Proposal Studied: If ITAA President or the BOT favors the idea, it would be forwarded to the ITAA Conference Committee and the BOT for exploration and for a recommendation back to the Board at their next meeting.

Await feedback from the BOT on the desirability of such a conference. If the Board is in favor of the concept, begin planning.

3 Years Out_____

Conference Proposal-Approved by ITAA: At this point, an indication of approval is to be expected from the ITAA Board. Pick the dates of the conference.

Form a Host Committee: (see Chapter)

Venue: Exploring possibilities for and booking the conference facilities involves site visits by a number of chairpersons to view the rooms, accommodations for meetings and social events, parking facilities, catering and equipment. Explore at least two other venues before actually booking. Ensure that there

are other hotels nearby with additional accommodations available if there is an overflow. Investigate and secure low-cost accommodations. Note transportation availability between conference site and outlying hotels.

Delegation of Duties: Choose people you know to be reliable, efficient and knowledgeable to co-chair and staff your conference. Clearly delineate their various tasks, preferably in writing.

Negotiate ITAA Contract: The chair of the local host committee should negotiate a contract for the conference with the ITAA as early as possible.

Program Development: Develop a theme. Develop a logo. Identify possible opening and closing keynote speakers to be invited. Determine honoraria for keynote speakers, if any. Plan publicity

Budget: Draft a preliminary budget.

2 Years Out_____

Venue: Select, negotiate with and obtain a signed contract from the hotel. Decide whether or not to obtain insurance should conference be cancelled by hotel or natural disaster. Make a clear agreement about how many rooms will be booked, and how many delegates will have to book accommodations as part of the hotel contract.

Request the equipment you require at the time of booking the conference facility including, lecterns, microphones, flip charts, blackboards/whiteboards, video monitors, overhead projectors; slide and Power Point projectors as well as secretarial, computer, Internet and copying availability. If the hotel does not provide them or is too costly, request bids from outside providers who can deliver the equipment.

Budget: Firm up the budget.

Program Development: The Program committee issues a call for proposals, decides on a basic outline for the schedule and program and contacts individual members to encourage them to submit program proposals to fill out the program.

Confirm keynote speakers. The keynoter sets the tone for the conference theme. Keynoters, institute presenters and plenary panelists need to be invited well in advance, initially by e-mail or by phone to be followed up by letter. Get written confirmation of acceptance and terms

Communication: Maintain regular communication with the ITAA President and Board, the ITAA office, and the Conference Committee.

Publicity: Develop a master plan for publicity. Coordinate with "The Script" editor for types of materials needed. Make graphics for ITAA web page and submit to web master.

1 Year Out_____

Scientific Program: All presenters are being confirmed in writing and scheduled. Contracts are sent to the presenters, indicating conference registration is required and indicating cancellation policy including deadlines. A list of presenters who might be willing to substitute in case of cancellation can be useful. Prepare workshop schedule and post online, layout draft of printed program book, if one will be provided. Include as many names of presenters as possible. Have Continuing Education Credits in place by 9 months previous to date of conference.

Social Program: The cheer and goodwill generated by this aspect of the conference is vital to its success. Characteristic of TA conferences is the location of a central place for the relaxed exchange of ideas, meeting and greeting old friends and meeting new people. The Connector area, banquets and buffets, dances, a children's or youth program, optional tours and entertainments, support groups, men's and women's caucuses, etc. are typical offerings in the social planning. A banquet followed by a dance with live music is a strong tradition at ITAA conferences. There are wide variations possible according to your locale and the preferences of the committee. Make all arrangements now, solicit local talent and obtain signed contracts.

Publicity: All publicity should now be in place. Public service announcements should be prepared to send to local radio, TV and newspapers. If posters have been developed, develop a list of organization or groups for distribution. Coordinate with ITAA editors (Script and TAJ) and webmaster to publicize conference. Develop 3-4 ads for publication or social media to be published 9, 6, 3 months and 4 and 2 weeks ahead of the conference. Arrange interviews on local TV and radio stations for the keynote speakers or local ITAA members.

Venue: Maintain frequent contact with venue representative. Review all aspects of the agreement.

Registration: Develop system for keeping track of all registrations. Send confirming email to registrants and presenters. Work closely with Continuing Education chairperson to ensure coverage of registration desk.

Social Program: Make all arrangements now, solicit local talent and obtain signed contracts. Especially important is the selection of the live music for the banquet. Make sure that they will provide music for "jumping up and down" (Eric Berne's description of a good party) for dancers of varied ages and backgrounds. (Latin rhythms a must.) If possible, ensure that there is a quieter area for conversation.

Volunteers: Continue to recruit local volunteers to help in the conference. Volunteers should be meeting regularly.

Budget: Monitor budget monthly. Revise projections as appropriate. Report to the ITAA Board twice per year and consider alternate ways to increase revenue at conference (e.g., exhibits, recordings, proceedings, booklets, advertising, photo sales, and other outside events).

6-9 Months Out_____ Review travel bookings for special speakers. Review audiovisual needs and obtain bids from suppliers. Obtain ITAA Board and Committee meeting requirements from BOT Secretary and make arrangements with the venue. Update all publicity make contacts with local media. Review and refine budget. Plan for recognition ceremonies and order awards, if appropriate

3-6 Months Out_____ Select menu for banquet Order printed materials: portfolios or notebooks, nametags, ribbons, etc. Confirm special events. Prepare signs.

6 Weeks Out_____ Finalize food and beverage requirement. Finalize ITAA Board meeting requirements. Plan schedule for the connector room. Prepare and distribute press packets, and hold press conferences. Arrange for people to introduce keynote speakers. Print evaluation forms and make plan for distribution and collection.

4 Weeks Out_____ Visit venue and go over final plans, Review program, and have final program printed. Prepare registration packets. Prepare roster of attendees and all handouts. Final foreign language interpretation arrangements confirmed. For general sessions, confirm speaking order and length of presentation (Important!) with all speakers. Assign a reporter to write for *The Script,* and a photographer to take pictures for publication. Do final mailings and local publicity with schools and institutions.

Day Before the Conference_____ Set up at the conference site. Walk through the program at the meeting site. Review all set-ups, including the registration area. Review the rooming list with the hotel. Hold a pre-conference meeting with hotel personnel, volunteers and Host Committee as well as with the ITAA staff, if present. Meet with volunteers for last minute briefing and pep talk

Establish Communications Central. Answer calls from press, out of town visitors, late registrants etc. Make sure the venue switchboard and Front Desk are aware of conference and knows how to refer inquiries to the Communications center. Set up two large message boards: one message Board for delegates (with message slips and writing materials) and another for program announcements.

Day of the Conference_____ Communications Center: Host Chair or representative and volunteers must be available throughout the Conference to field questions complaints and suggestions.

Have daily debriefing meetings with Host committee members and volunteers.

There may be many complaints. That's normal. It is important to keep up morale, respond politely to all complaints and suggestions and to try to find solutions to problems. It's OK to solicit strokes from attendees and each other. You are doing a great job and deserve much praise! Give strokes and discuss what is working, what is problematic and how to solve problems that arise.

Post Conferences_____

Evaluation: This is how you will know whether and how well you accomplished what you started out to do. Participants can assess their work as well. Forms for evaluations are essential to getting the feedback in a format that can be useful for future planners and presenters. Final figures and numbers from the conference, press clippings, and post conference reports from committee chairs are also essential feedback data.

Basking in the Glow: Work Accomplished! And now it's cleanup time. This is a fun time to relax and bask in the glow of your accomplishments. Have a little party give each other strokes and tell stories Plan to work together again soon. Isn't Transactional Analysis just wonderful?

Hold post-conference meetings/communications to report and exchange information, Opinions, pros and cons and other data are most effective the closer they are in time with the end of the conference. Letters of appreciation should go out as soon as your data is in and assimilated and you've gotten your health back.

Write and Review and Finalize: Write thank-you notes to all presenters with summaries of their evaluations, and finalize registration list. Coordinate disbursements with the ITAA financial officer. Review evaluations. Write report to BOT through Conference Committee chair with suggestions for future conferences. Encourage papers for TAJ and the Script arising from particularly well-done presentations. Finalize all tapes, books, DVD and CD sales. Contact the VP of Operations to update this Manual

6. Specific Aspects

6.1 Selecting a Theme

One of the key ingredients to a successful conference is the selection of a viable theme around which the program will be constructed. The Keynote speaker will address this theme, and inspire and instruct the participants in the Opening event, and the daily keynote speeches.

We all have our favorites. In the initial discussion about the theme of the conference, keep in mind what may be your favorite may not fly with the other committee members. You don't want a watered-down theme that will have a ho-hum response, so finding ways to put potency in the theme is the desired outcome. Writing the description of the theme must be inspired; otherwise people will not be attracted to learn more about what you are presenting. Most of the papers in the conference will be expected to address the theme in a significant way. If you decide to compile a written or electronic group of conference papers, the theme will tie all these presentations together.

When the theme is too restrictive, the conference becomes boring, because ideas are mentioned over and over again. When the theme is too broad, the public relations committee doesn't have much to work with. Keep in mind that the committee must invent a logo, or visual to associate with the theme. In the "New Wine from Old Roots" theme, the visual was a grape vine, showing the roots, representing the history and culture of transactional analysis. "Freedom and Responsibility" of the Edinburgh World TA Conference, showed two arrows, one white and one blue, intersecting each other.

6.2 Budget

The budget includes projections on attendance. Strive for a profitable conference. ITAA will request 30-50% of the profit in exchange for the designated conference status. Include the amount of seed money requested from ITAA and co-sponsoring group.   ITAA will not be liable for sharing of any losses.

The budget is a theoretical document made real by the amounts of money needed to run the conference. How difficult it is to estimate the future, and yet a budget is supposed to do just that.

Look at three possible outcomes for income: such as attendance at a 100, 200, and 350. After a certain count, for example 250, all your expenses are paid, and the bursar can rest a little easier.

Moderation and short cuts are the keys to your conference budget. You'll want to be able to finance the creativity of your committee members, while keeping an eye on the "dollars and cents" of the project. Both ideas are easily achieved, although you might not be the most popular member of the conference committee while these issues are being discussed.

By including the items on the list described on the next page, you'll see the items that need to be decided when formulating your initial budget. Make sure you include an estimate on each of these items, even if it doesn't make sense at first glance. These items are included to give you some leeway as the conference planning unfolds, and the actual budget amounts become clarified. It is the difference between the actual figures and the potential figures.

For example, it might be easier to buy a stamp of the conference logo, to make up your own envelopes, than to buy printed envelopes. Budgeting is an active process, not a passive one. Questions of "is this covered on budget, should be uppermost in every discussion about a particular aspect of the conference.

6.3 Conference Schedule

SAMPLE: OUTLINE OF YOUR FUNCTION ARRANGEMENTS

Tentative Conference Schedule

Sample Schedule for International TA Conference						
Monday	Tuesday	Wednes-day	Thursday	Friday	Saturday	Sunday
						ITAA Board of Trustees (Previous Sunday) Day 1
ITAA BOT MTG **Day 2**	Worldwide TA Cert. Council or another Trainer / Examiner meeting (Morning) TA101 (Day 1) BOC exams (Eve)	IBOC exams (Day) TA101 (Day 2) Confe-rence Opening (Eve) Welcome Recep-tion	Early morning meetings / meditation / yoga etc. Keynote (Morning) Sessions (Day) TA Assoc. Presidents' Meeting (Lunch?) AGM of co-sponsor Associa-tion	Early morning meetings / meditation / yoga etc. Keynote (Morning) Sessions (Day) ITAA Annual General Meeting (Eve)	Early morning meetings / meditation / yoga etc. Keynote (Morning) Sessions (Day) Conference Closing (Eve) Gala Dinner and Dance (Later Eve)	Post-Conference Institutes Training Endorse-ment Workshop
Second Monday	**Second Tuesday**					
TEW **(Day 1)**	**TEW** **(Day 2)**					

6.4 Venue

Three factors determine the choice of venue: location, availability and atmosphere. Our conferences are known for having a place in the venue to socialize and meet people. The "connector room" gives attendees a chance to be more informal with each other, to make plans and to forge friendships. In your planning appraisal of the venue, you will be looking for such a place. The location of the conference is often a discussion that takes place years before the actual conference. The ITAA conferences have been all around the world, and each site has its unique experience attached to it. In San Francisco, it's the cable cars and in India, it's the motorized rickshaws. Ideally the conference is close enough to a metropolitan area which offers attendees from out of town an opportunity to travel as well as attend the conference. Many cities such as Sydney offered so many tourist attractions that attendees were content to explore the city.

So, you've found the perfect place which has the "just right" atmosphere, and then is it available? Often good sites plan their own events two or more years in advance, so timelines are of the utmost importance. Once you've located a venue, even if it's a possibility, contact the management to find out their calendar of events. You'll want to estimate the number of rooms needed for the program and the number of sleeping rooms needed. This is an estimate only, and will be more detailed at the time a contract is signed.

Because ITAA conferences are planned so far in advance, the planning committee will have a fairly good idea how many will be attending. In the recent world TA conference in Edinburgh, the university could only accommodate seven hundred sleeping rooms, so people were turned away at the last minute due to a shortage of rooms. Alternate sleeping rooms can be arranged at nearby hotels or bed and breakfast hotels as well. As the conference date draws nearer, there will be a final signed contract with the venue, and adjustments can be made.

Be sure to take note of any special rules a venue may have. One San Francisco conference was held at the same time as a union strike, and even though the contract says only union workers could carry into the hotel our apparatuses for the conference, we had to make a difficult decision to cross the picket lines. Some venues prohibit food being brought in from the outside as an example of watching for these unique rules. Most of these conflicts are worked out satisfactorily for each side.

6.5 Program Booklet
- Final Booklet to be handed to attendees at registration on request
- Extra copies can be available at registration desk.
- Program Booklet is uploaded on website and shared with conference registrants

6.6 Basic Outline of Final Booklet
- Cover page
- Logo
- Dates
- Venue
- Welcome from President
- Welcome from Host Chair

One Page Overview: Summary of schedule of activities with times of the whole conference including pre and post conference activities

Daily Programs: Daily overview page. List of presentation times, titles, abstracts, pictures and biographies of presenters.

Alphabetical list: List of all presenters and pages where they appear in the booklet.

Venue Map: Map of the Venue with room names and numbers

City Map: Map of the city, conference hotels and transportation.

Advertising

6.7 Internet

A well-ordered web page for your conference can be a great magnet for attendance. One year before the conference you should place a link on the ITAA and other TA and professional organizations leading to the Conference's index page. The link should have the Conference logo with theme, date and location as well as a line indicating the availability of CEU's, this ad will be placed on a prominent place in the ITAA web site index page by the ITAA webmaster.

Your web site should have an index page with links to:

- Registration with details of costs and method(s) for paying registration fees
- Call for papers for delegates to make presentation proposals
- Venue for booking accommodations
- Continuing Education Credit's with details of who is eligible
- Your city's Chamber of Commerce web page
- Social programs and special programs: such as youth events.

Each one of these links and the home page should have a link called "Contact us" with the name and e-mail of a person who will respond to questions and suggestions. This contact person should check and answer their e-mail at least every other day and twice a day starting a month before the conference.

In addition to the links, the home page should include the logo, the theme of the conference, dates and times and an expanded mission statement singing the praises of the conference with an abbreviated description of the program and the names of keynote speakers.

It is preferable if delegates can pay for registration and venue with a credit card but if that is not possible, they should be able to register by e-mail and send a check by mail or pay upon arrival; a far more cumbersome procedure.

The internet page may be the introduction to the ITAA for newcomers. Therefore, it should be written with newcomers in mind so as to welcome lay people and professionals to join us

6.8 Translation / Interpretation

The primary language of all ITAA Conferences is English. It is ITAA policy to offer translation and interpretation at all International Conferences whenever feasible.

In general, this policy has been implemented as follows:

At ITAA Conferences, we usually offer interpretation into one primary language (other than English) at each conference. Exception: at the San Francisco Conference in 1995,2007, and 2014 we offered interpretation into Spanish and Japanese.

Volunteer interpreters are sought to provide the interpretation service.

A decision about incentives or rewards for interpreters is made at each conference, specific to that conference. Sleeping room expenses, conference registration, or very modest honoraria can be offered. Candidates for examination have arranged and paid for their own interpreters, who have sometimes continued to provide services throughout the conference.

Always give ample recognition and strokes for the interpreters' work are given in the program materials and in public ceremonies.

It is essential that all interpreters be familiar with TA. It is useful to provide them with an orientation meeting, and with a printed lexicon of familiar TA terms. Two techniques of interpretation: the whisper technique, and consecutive interpretation. With the whisper technique, all speakers of Spanish (for example) gather in the far corner of the room, while the interpreter whispers a simultaneous translation. The presenter must speak slowly, and pause when the interpreter indicates a need for a pause. With consecutive interpretation, the interpreter and speaker work together on stage, speaking alternatively, slowly, sentence by sentence.

- Usually general sessions must be interpreted by the consecutive technique.

- Headphones are desirable to minimize the disturbances because of the constant hum of the translations.

- It is essential to let the speakers and workshop presenters know in advance that they will be interpreted, because interpretation is very time-consuming. It means that they must prepare about one-half the material that they would present for an all-English presentation. So, it must be part of their contract in advance that we will provide interpretation.

- If at all possible, appoint interpreters to the workshops well in advance, and inform the presenters that they should send an outline of their speech to their interpreter in advance. It also helps to provide time for interpreters to meet their presenters in advance of the workshop.

- Translation of printed matter. Ample lead-time must be allowed to give the volunteer enough time to translate materials. Separate program booklets can be produced in different languages or one-program booklet is produced in two languages. All-English program booklets can be supplemented with summary programs in shortened form.

7. Continuing Education

A conference that offers continuing education units is a positive draw for individuals who may be new to the theory and practice of transactional analysis. These credits are certified by an agency which has contacts with licensing boards in states requiring credits to maintain a license to practice. For example, in California, the Board of Behavioral Science Examiners requires 18 CEU credits every year. Although these units may not be required yet in other countries, having the certificate of attendance is a positive entry on any resume. The Local host committee can explore what forms of Continuing Education Credit are beneficial to the intended audience.

This job requires the coordinator to be on site before and after presentations, and will give out certificates at the completion of the conference. The agency certifying these units needs a resume on the presenter, an outline of the presentation, plus the learning objectives to be spelled out in detail, before the conference takes place. The attendees will fill out a small test after they have attended the presentation.