Conference Hosting Guidelines

The purpose of this document is to provide schools who are hosting a UNICON conference with basic information about UNICON's expectations and policies as they relate to various aspects of hosting a conference.

A member school, working with the Conference Committee, will make a proposal to host a conference that will be considered for approval by the UNICON board of directors. Once approved, the hosting school will proceed with the conference preparations, as outlined below. Host schools are highly encouraged to read the Conference section of the UNICON Policy Guide posted on the UNICON website.

A candidate school should attempt to secure approval to host a conference, approximately one-year in advance of the conference date, to ensure that they have plenty of time for conference planning and execution.

The key contacts for the host school will be designated members of the UNICON Conference Committee and the UNICON Executive Director.

1. **Conference Support Committee Membership**
   A Chair, or Co-Chairs, is/are chosen from the board of directors. Other members typically are selected from schools that have recently hosted a conference or who will host a conference in the near future. The current members list may be found in the front of the Membership Directory.

2. **Conference Policies:** Conference policies are established by the board.

   Dean's Letter: UNICON requires a commitment letter from the hosting school's dean. There is no standard format for this letter. The letter needs to communicate the school's full commitment to hosting a specific conference in accordance with UNICON's expectations and policies. This letter should be sent to the UNICON Executive Director.

   Theme and Design: The host school is responsible for developing themes and conference designs in collaboration with the UNICON Conference Committee. Conference themes should adequately reflect UNICON's international membership and global reach. These designs should be relevant and cutting edge, showcase the school's strengths, maximize participant interaction using contemporary learning technologies, and provide access to distinguished speakers.

   a) Directors' Conferences (usually in April) should be focused on strategic issues relevant to the director's role.

   b) Annual Workshop (usually in July) are typically focused on a singular "hot issue" and are intended to be opportunities to consider current topics and best practices through discussion led by members.

c) <u>Team Development Conferences</u> (usually follows the week after U.S. Thanksgiving Holiday but not limited to that timeframe) are focused on marketing, operations and strategic issues, intended for staff members from all functions for development purposes. The conference typically includes
- 3-4 Plenary sessions
- Special "Directors Roundtable" session
- Research report presentation by UNICON Research Committee
- Multiple Concurrent sessions. Concurrent sessions provide opportunities for member involvement and should be selected based on those who respond to solicitations by the host school.

3. **Conference Budget:** A conference budget must be developed and approved by the Conference Committee. The budget should be "budget neutral" aiming for no profit or loss. If a profit does materialize, it is returned to UNICON. If a loss is experienced, it is absorbed by the hosting school. UNICON will provide support services to assist the hosting school to achieve a "neutral" outcome. The Committee seeks a balance between the anticipated enrollments, the tuition fee and conference expenses. All budget items will have a direct connection to the delivery of the conference.

a) The individual registration fee covers the conference and conference venue/catering, including any extra-curricular activities arranged by the host school. Accommodation expenses can be paid separately by the individuals either to the host school if the conference is to be hosted onsite, or to a third-party hotel/conference venue. Accommodation at external hotels should be negotiated at a special conference rate.

b) Budget items such as "Faculty Director" or "Conference Design" are not acceptable. University levies on revenue are expected to be waived prior to selection as the host school. Member schools are expected to contribute staff support time to the conference and not include this as a budget line item as a conference expense.

c) In special situations, a hosting school may receive subsidies. This usually comes into play when UNICON seeks a conference in a remote part of the world, or under conditions unfavorable to the host school. Subsidies must be requested in advance and be included in the preliminary budget for approval.

d) Any expenses for non-conference related activity, such as the UNICON board meeting and/or Leadership Academy, are not included in the conference budget and are the responsibility of UNICON, not the host school. The host school will collaborate with the UNICON Executive Director on all such matters.

e) Dinners or other special events should be included in the budget and covered as part of the participant registration fee. Reasonable transport costs such as buses, should be included in the budget also. Reasonable alcohol consumption could be included in the budget (recommend beer/wine options)

f) Add-on activities prior to or after the conference dates can be made available to conference attendees but are not included in the conference budget or registration fees. These should be treated separately.

g) Hosting a UNICON conference is an opportunity to build the brand of the host school. Due to this fact, UNICON encourages host schools to donate their faculty contributions whenever possible. That said, speakers at UNICON conferences may be uncompensated or receive compensation. They may be reimbursed by the host school for reasonable and actual travel and expenses. These expenses and fees must be included in the preliminary budget and pre-approved by the Committee.

h) Gifts can be included in the budget at a reasonable cost (about $35 per participant) but must include the UNICON logo. Gifts branded with only the School logo should not be included in the budget. Reasonable speaker gifts are covered in the conference budget.

4. **Conference Fees** are waived for staff members from the host school and partner school who are involved in the conference, for faculty and for non-member speakers. These fees are also waived for two winners of the Members Survey Incentive Drawing, announced in early October. One winner will attend the next team development conference, and one will attend the next directors conference.

5. **Website:** The conference website will be developed and hosted by the school. The Conference Committee will provide examples of successful websites from prior conferences. The conference website, showing the theme, agenda, logistics, and registration function, should be active approximately 3 months prior to the conference. The UNICON webmaster will also serve to support and advise the host school.

6. **Board Meeting:** Conferences are always offered in conjunction with a UNICON Board meeting. This meeting is planned by the Executive Director with the support of the host school. Typically, the host school will help secure a board room, meeting logistics such as lunch and coffee, and dinner reservations. There is always a Board/Emeritus dinner associated with the meeting. The host school will be asked for advice regarding a dinner venue. All expenses for the Board meeting and dinner are the responsibility of UNICON and will be managed by the Executive Director.

7. **Conference Attendees:** Attendees are limited to staff and faculty working in the area of executive education for a member school (a current listing is in the UNICON Directory) and to staff and faculty from schools currently applying for membership in UNICON (a list will be provided by the Executive Director); one time only. Spouses can register for any extracurricular events (e.g. dinners, social events) for a related fee. On some occasions guest schools (non-members who are not in the application process) will be invited to attend. In these cases, the Executive Director will inform the host school of their names. Suppliers, competitors, corporate universities and consultants may not attend without special permission.

8. **Conference Size and Location:** The number of enrollments often depends on which conference is under consideration. In general, it is preferable to hold conferences on campus.

   a. <u>Directors' Conferences</u> are expected to number in the range of 50-80 participants, including host school personnel and speakers. Initial budgets should be prepared based on 60 attendees with contingency for 50 and 80.

b. <u>Annual Workshop</u> attendance can be in the 40-60 range depending on location. Host schools should target 50 for budget but prepare continency for 40 and 60.

c. <u>Team Development Conferences</u> generally have about 150-200 attendees, including host school personnel and speakers. Initial budgets should be prepared with scenarios of 150, 175, 200 paying attendees. Team Development Conference host schools should consider capping registrations at a maximum of about 5 (or what seems reasonable under the circumstances) per member school for an initial registration period (usually two to four weeks) to allow all member schools to enroll participants. Board and Emeritus members don't count against this limit. Once the protected period has expired, the cap should be lifted, and member schools may enroll additional participants.

Host schools are expected to absorb modest material and catering costs (e.g. paper, flip charts, breaks, lunch). However, host schools may apply in advance for reimbursement of extraordinary material costs (e.g. books, handouts, high profile speakers).

9. **Partner School:** UNICON encourages schools to form a partnership to host a UNICON conference. This approach brings more resources to the table in support of a conference. The choice of a partner (or partners) need not be known at the time the original proposal is submitted.

10. **Evaluation, Budget Report and Settlement:**

- Conference Evaluations
  - o The host school provides evaluative feedback to the board through the Conference Support Committee and directly to the presenters.
  - o Host schools may use their own evaluation forms or those used in past conferences.

- Budget Report and Settlement
  - o Following the conference (about 2-3 months post conference date), the host school will provide the Conference Committee with a full budget report and accounting along with program evaluations. The Conference Committee will present these to the board and manage the settlement if any.