



International Association for Educational Assessment

Conference Handbook

September 2014

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Abbreviations and acronyms

CHO	Conference Host (Organizer)
BoT	Board of Trustees
MOA	Memorandum of Understanding

1. Definition of an IAEA conference

IAEA's mission is to help advance – through professional interchange – the science and practice of educational assessment by organizations around the world. IAEA is primarily an association of governmental and non-governmental non-profit organizations whose main business is educational assessment. However, the membership also includes individual, associate and affiliate members.

The aim of each IAEA conference is to provide a forum for members to exchange ideas and experiences with a view to enhancing educational assessment among its members and strengthening mutual understanding and relationships.

The annual IAEA conference is organized by a primary member who has volunteered to host the conference with no compensation from the IAEA. However, an IAEA conference is, first and foremost, an IAEA event. The responsibility for all aspects of the conference that affect members ultimately rests with the IAEA President.

The purpose of this handbook is to document the responsibilities of the conference host/organizer (hereafter, "CHO").

2. Accountability

The CHO is required to:

1. Be receptive to interaction with the appointed BoT (Board of Trustees) representative throughout the planning process on all matters that have an impact on members and/or on the IAEA reputation.
2. Provide a detailed description of facilities at the venue and of accommodation options available to the BoT well before a final decision is made, especially with respect to accommodation to be offered to conference delegates;
3. Submit the proposed theme for BoT comments at least 18 months before the conference (sub-themes are not mandatory for the conference) and obtain final approval from the BoT;
4. Consult with the BoT representative before issuing international invitations e.g. UNESCO representative;
5. The CHO is also required to obtain approval from the BoT for:
 - a. The proposed conference registration fees;
 - b. The accommodation arrangements and costs;
 - c. The keynote speaker/s.

3. On organizing an IAEA conference

These are guidelines to assist conference hosts. The CHO may make alternate suggestions as per local conditions which should be discussed with the BoT beforehand.

3.1 FINANCING THE CONFERENCE

- a. The conference must be self-funding.
- b. The main source of funding is the conference registration fee.
- c. Another potential source of funding is through sponsorship.
- d. No funds can be drawn from the IAEA treasury to support IAEA conferences.
- e. Appendix A has an IAEA conference budget template which the CHO may choose to use, and modify as appropriate.

3.2 SETTING CONFERENCE REGISTRATION FEE

The CHO should try and keep costs affordable so that attendance at the conference is accessible to as many international delegates as possible.

The conference registration fee covers all costs not covered by sponsorship; it is clear that the higher the level of sponsorship, the cheaper the conference outlays for both CHO and delegates.

The registration fee should be set so that it is sufficient to cover the following: hire of conference venue, conference facilities, provision of all meals and breaks, equipment for presentations, fees for speakers, conference kits, conference programs, receptions, CHO planning costs, production of all materials (programs, badges, kits) and costs associated with desktop publishing and IT. Registration fee planning should take into account prospective sponsorship.

When delegates pay the registration fee, they can safely assume that it covers the Welcoming Reception (Sunday evening) and the formal Gala Dinner. There should be no option of delegates paying separately for the Gala Dinner.

When setting the attendance fee for those who wish to attend on a daily basis (as opposed to delegates attending the full conference), the CHO should ensure that the daily fee multiplied by 4 plus the cost of each of the social events (Welcome Reception and Gala Dinner) should not be less than the full conference fee.

The registration fee for non-members should be approximately 10% more than for members.

3.3 ENTITLEMENTS OF ACCOMPANYING PERSONS

Persons who accompany conference delegates should pay a registration fee that covers whichever of the luncheons and social events (i.e., Welcome Reception and Gala Dinner), that they wish to attend.

3.4 PAYING THE ASSOCIATION

The CHO pays the association (via the IAEA Treasurer) an amount of -

- USD1.50 per delegate attending the full conference
- The difference between the members' and non-members' conference fee multiplied by the number of non-members attending the full conference.

For example, if there are 100 delegates attending the full conference, 10

of whom are non-members, the amount to be paid to IAEA would be as follows:

- (a) $\$ 1.50 \times 100 = \$ 150.00$
- (b) Assuming the difference between members and non-members fee is \$ 50, the following fee is payable in addition:
 $\$ 50 \times 10 = \$ 500$

The total amount to be paid to IAEA is hence $\$ 150.00 + \$ 500 = \$ 650$

These fees are used to cover the costs of posting all information on the IAEA website and managing that site before and after the conference, including the posting of conference papers.

The CHO is required to devise a list of conference delegates¹ and present this list to the IAEA Treasurer. The names should be organized according to membership status (member, non-member) and presented to the IAEA Treasurer once the CHO is satisfied that the list of delegates has been finalized (i.e., after late registrants and withdrawals have been noted).

Arrangements must be made for the CHO to make the relevant payment to the IAEA Treasurer at the end of the conference.

3.5 WAIVING THE CONFERENCE REGISTRATION FEE

At the discretion of the conference organizers the conference registration fee may be waived for employees of the host organization(s), local education officials attending only part of the conference, and other local participants, as appropriate.

4. Conference venue and delegate accommodation

The conference venue should be decided well in advance of the conference (about two years before). Accommodation (including hotels and alternatives) should be decided about a year in advance.

4.1 CRITERIA FOR SELECTING CONFERENCE VENUE

- ✓ Hotel conference centre or university conference centre with hotel accommodation
- ✓ State-of-the-art conference facilities including rooms and IT
- ✓ Close proximity to city centre and/or facilities such as shops, cafés, bars and restaurants
- ✓ Close proximity of venue or ease of access of venue to international airports.

4.2 CRITERIA FOR SELECTING ACCOMMODATION

- ✓ Same place as conference venue unless there is no such place available

¹ For the purposes of this handbook, "delegate" refers to a conference attendee who pays a conference registration fee.

- ✓ A range of options suitable for different budgets (e.g., bed and breakfast, guest houses, a range of hotels (2-star to 5-star) hotels, etc.)
- ✓ Secure yet accessible
- ✓ Sensitivity to particular delegates' preferences (e.g., dietary requirements, accommodations for delegates with special needs).

4.3 ADVANCE NOTICE TO DELEGATES ABOUT VISAS, VENUE AND ACCOMMODATION

Vital information about the conference environment must be available for participants well in advance:

- ✓ Information about the conference venue should refer to outdoor temperatures, suitable clothing, availability of elevators (or lack thereof), and accessibility for people with disabilities;
- ✓ The CHO must make information available about any VISA requirements or any other important travel information (e.g., inoculation requirements) or must make conference delegates aware of where to access such information;
- ✓ Information about the accommodation should refer to cost of options, proximity to venue (available transport if applicable), security, availability of elevators (or lack thereof), accessibility for people with special needs, business facilities available (e.g., Wi-Fi in rooms, printers in business centre), and access to gymnasium or pool;
- ✓ Information about transport to and from the airport should be provided;
- ✓ Conference delegates should be advised to seek out any additional information via the Internet.

5. Preparing the conference program

5.1 CONFERENCE FORMAT

Traditionally the span of the conference is Sunday to Friday (six days).

Table 1, under Section 5.2, gives the conference format followed in recent years with some minor adaptations.

The structure of the paper sessions is not required to be the same from year to year. Also, other optional activities can be added to the program in addition to or instead of parallel sessions:

- Activities organized by the BoT in addition to those of the CHO
- Reception provided by conference sponsor
- Reception hosted by member organization

The CHO should alert the BoT Representative to any proposed changes to the conference format.

5.2 FINALISING THE CONFERENCE PROGRAM

The CHO program committee is responsible for:

- Selecting papers;

- Assigning papers to sessions²
- Assigning presenters to locations at the venue and timeslots in the program
- Selecting a program chair for each session
- Presenting draft outline to BoT for approval

The BoT welcomes requests from the CHO program committee for assistance in carrying out such tasks.

Table 1: General format for IAEA conference

Day	Event
Sunday	<ul style="list-style-type: none"> • BoT meeting (all day) • Registration of conference delegates • Activities organized by the BoT • Pre-conference workshops • Welcome reception hosted by the BoT
Monday	<ul style="list-style-type: none"> • Registration of conference delegates • Opening ceremony + President's opening address • Keynote address • <i>Coffee break</i> • Parallel sessions • <i>Lunch</i> • Parallel sessions • <i>Coffee break</i> • Parallel sessions
Tuesday	<ul style="list-style-type: none"> • Parallel sessions • <i>Coffee break</i> • Parallel sessions • <i>Lunch</i> • Parallel sessions • <i>Coffee break</i> • Parallel sessions
Wednesday	<ul style="list-style-type: none"> • Optional outings or tours (financed by individuals) • Possible visits to local educational institutions
Thursday	<ul style="list-style-type: none"> • Parallel sessions • <i>Coffee break</i> • Parallel sessions • <i>Lunch</i> • Parallel sessions

² Approximately a 1.5 hour session, which has typically consisted of three paper presentations plus Q&A.

	<ul style="list-style-type: none"> • <i>Coffee break</i> • General Assembly (Business) Meeting • Formal conference dinner (Gala Dinner)
Friday	<ul style="list-style-type: none"> • Parallel sessions • <i>Coffee break</i> • Invited talk • Closing Ceremony • <i>Lunch</i> • Post-conference workshop/s

5.3 SELECTING PAPERS FOR THE CONFERENCE

The CHO establishes a committee for program planning and paper selection.

The CHO calls for papers approximately six months before the conference, informs prospective presenters of the principles for paper selection and provides advice to presenters.

5.4 ADVICE TO PRESENTERS

- Tips on how to write an abstract.
- Advice on presentations (timing, slide presentation)
- Desired format of conference paper
- Copyright questions:

By participating in the conference, authors are granting permission for their papers to be placed on the IAEA website and to be made available to conference delegates (e.g. on a data stick, CD)

Authors are not required to sign over copyright of their paper to the IAEA or the CHO

Authors must make the CHO aware of any copyright issues that could affect the publication of the conference paper on the IAEA website or making copies of the paper available to conference delegates.

5.5 PRINCIPLES FOR PAPER SELECTION

Papers are selected from those received by the deadline according to a set of principles³.

- a) The paper must be relevant to educational assessment (as opposed to a more general education topic);
- b) No more than one presentation⁴ per person (alone or in combination) unless vacant slots remain on the conference program. This does not preclude multiple authorship;

³ Does not apply to invited keynote speakers

⁴ Discussant status does not count as a presentation

- c) In general, all papers should be accepted in accordance with principles a and b above, the intention being to allow as many IAEA members as possible to have an active role in the conference.
- d) Consideration should be given to include a discussant in some sessions. The discussant should be selected by the CHO in a way similar to the selecting of session chairs. These sessions will need careful planning beforehand to ensure that papers are available in a timely manner.
- e) The CHO is responsible for ensuring that members, delegates and persons submitting papers are made aware of these principles.
- f) The CHO is encouraged to consult with the BoT representative throughout the process to ensure that these principles are followed and appropriate guidance can be given.

5.6 GUIDELINES FOR SELECTING CHAIRS FOR THE PROGRAM

This task is undertaken by the program planning committee according to the following guidelines:

- a) Attempt to assign chairperson role to the official representatives from Full Institutional Members;
- b) Make sure that each chairperson is informed, in writing, of her/his responsibilities (including the procedure to follow when presentations are cancelled);
- c) Make every effort to be responsive to concerns of presenters or chairpersons to avoid potential conflicts;

NB: The same procedures apply to selecting discussants.

6. Making arrangements at the conference venue

6.1 RECEPTION, REGISTRATION DESK(S) AND STAFFING AT THE VENUE

Responsibilities

- Greet participants on arrival
- Distribute presentation folders (including name tags) to participants
- Collect outstanding conference fees
- Collate information about optional tours and receive payment for these where applicable
- Assist participants throughout the conference by answering questions on a variety of matters and/or directing them to the appropriate person/place
- On the last day of the conference, issue personalized certificates of participation to conference delegates (optional).

6.2 MAKING ARRANGEMENTS FOR THE BoT AT THE VENUE

Arrangements including payment should be discussed with the BoT representative and agreed to beforehand.

Designated room at venue

- for BoT meeting on Sunday (break and lunch catering required)

- for ad hoc BoT internal meetings
- for ad hoc BoT meetings with CHO or other members
- for Treasurer/Membership Secretary receiving new members/fees

Requirements

- Internet access
- Connexion to printer
- Easy access to photocopying (beyond business hours)
- Copying facility, (including colour copying), suitable for tight deadlines

Conference opening

- Seats are reserved for BoT members and keynote speakers in front row with CHO representatives.

Conference dinner

- Unless decided otherwise, BoT members and office bearers [are seated at the same table as the CHOs together with the keynote speakers and local dignitaries who attend
- Conference-specific advice should be taken if any of the above are accompanied by their partners

Program requirements

- Office hours for IAEA Treasurer (has responsibility for membership administration and payment of annual membership fees)
- Time for AGM (usually late Thursday afternoon)

AGM

- Make appropriate arrangements at the venue (e.g., seating)
- Provide support for registration of those attending the AGM

A month in advance of the conference opening, the CHO should co-ordinate with the President in respect of speakers at the following events:

- Welcome Reception;
- Opening Ceremony;
- Gala Dinner; and
- Closing Ceremony.

See Appendix B for Conference for a Planning Checklist and Appendix C for Suggested personnel speaking at ceremonies.

Ad hoc calls for assistance

The President, Executive Secretary and Treasurer are likely to approach the CHO regarding conference-related matters as they arise, as well as about gifts, optional functions and so on.

6.3 Arrangements for pre- and post-conference sessions

The CHO should make all arrangements for pre- and post-conference workshops. This includes arranging venues together with the necessary equipment. Registration for the workshops should be done at the same time as registration for the conference. The topics and presenters should be cleared with the BoT representative.

6.4 Language of the conference

The language of the conference is English, with one exception: When the conference is held in a non-English-speaking country, there may be additional conference languages; in this case the conference hosts are responsible for translation and interpretation facilities.

6.5 Conference sponsorship

It is the CHO's responsibility to handle all issues related to sponsorship.

General sponsorship of the conference and sponsorship of specific events should be indicated on the conference program.

A sponsor must not claim more than was agreed on and covered by the contribution made.

6.6 Exhibits at the conference

Exhibits are acceptable for IAEA members and non-members alike. A fee may be charged by the CHO as a way of helping to subsidize conference costs. For member organizations already providing support for the conference, the fee may be waived.

6.7 Completion of Conference Report Form

The CHO must complete the Conference Report Form (Appendix D) and submit it to the Executive Secretary within a month after the end of the conference.

7. Helpful tips passed on from previous conference hosts

- CHO taking part in the BoT meeting Jan/Feb of conference year for clarification purposes
- BoT member visiting CHO at least 12 months ahead of conference to check out venue, accommodation, ambience etc. as priorities might not be the same for organizers and participants
- Obtaining guidebooks and other documentation from other successful conferences
- Participating in several conferences (observing not only what worked but what did not work)
- Accommodating the needs and values of a diverse membership (e.g., access to the venue, specific dietary requirements).

- On registration form, ask the delegate to indicate whether they or their organisation is a member. The CHO should then verify this information from a list of current members received from the Treasurer/Membership Secretary
- Informally updating the BoT at key stages including:
 - at the time of the launch of conference website
 - prior to issuing invitations
 - after deadline for receipt of papers for consideration
 - at the close of registration, with details of number of submissions
 - upon finalization of the program;
- Communicating with the BoT representative and BoT members as necessary on an ongoing basis; for example:
 - meeting all BoT members early in the conference planning process;
 - submitting full progress reports to the two BoT meetings preceding the conference; and,
 - contacting and consulting with BoT as problems arise, when questions need to be answered, or when assistance has been appreciated (e.g., in the paper selection process)
- An on-line system for payment of conference registration fee, booking and payment of accommodation is desirable. Participants would receive instant acknowledgment of their request as official receipts would be issued automatically. Arrangements should be made for delegates who are not able to make use of the online system for payment.

Appendix A: IAEA conference budget template

Details		Amount	Price	Total
1. Revenues				
1.1	IAEA member			
1.2	Non-IAEA member			
1.3	Non-member Local Registrant			
1.4	Sponsorship & Exhibition - estimates			
	Total			
2. Expenses for requested services				
2.1	CDs for advertisement			
2.2	Conference bags			
2.3	Name tags for participants			
2.4	Memory stick (2MB) with papers			
2.5	Conference website: design & maintenance			
2.6	Graphics & printing (conference program & Ads)			
2.7	Secretariat			
2.8	Registration handling			
2.9	Manpower: information desk + hostesses			
2.10	Audio Visual equipment plenary hall + 3-5 presentation halls			
2.11	Registration booths: manpower, equipment (computers & printers)			
2.12	Keynote Speaker(s)'s fee: airfare, accommodations, honorarium			
2.13	Hotel venue - 1 lunch + 2 breaks X 4 days			
2.14	Cocktail party with Music			
2.15	Gala Dinner + entertainment			
2.16	Opening Ceremony + music/performance			
2.17	Plenary Hall + 3-5 presentation halls X 4 days			
2.18	IAEA BoT room			
2.190	Internet broadband access			
2.20	Rental of equipment (copier)			
2.21	Payment to IAEA: 1.5\$ per delegate + diff. between members' and non-members' fee			
2.22	Bank and credit charges – estimated			
2.23	Liability Insurance			
2.24	Miscellaneous			
	Total			

Appendix B: Conference planning checklist.

Months before the conference	Activity
18	<ul style="list-style-type: none"> • Choose the conference dates, theme and sub-themes • Identify conference venue, including all rooms needed for the various purposes • Identify accommodation sites • Prepare a detailed budget for the conference, estimate conference costs and revenues, and set registration fee • Submit details of conference dates, venue, accommodation and conference fee to BoT for approval
12	<ul style="list-style-type: none"> • Prepare a publication brochure to be distributed to members attending the conference that takes place the year before CHO's conference. The brochure should include the following: conference dates, venue, accommodation, deadlines for abstract submission and registration and conference fee) • Confirm arrangements for accommodation and venue and meeting rooms and other rooms • Plan a launch of the conference Website • Plan and start PR campaign to recruit sponsors • Plan optional daily tours, visits to local educational institutions, and events that require advance registration or payment • Publish the conference details in the IAEA website
9	<ul style="list-style-type: none"> • Compose and distribute a "Call for Papers" to relevant local and international audiences. Make sure to specify the requirements for the abstract and allow 4-5 months for submission.
6	<ul style="list-style-type: none"> • Review abstracts and select papers for presentation • Notify submitters of acceptance or rejection. • Notify presenters of requirements for preparation of paper (e.g., submission of PPT and full paper etc.) • Open early bird registration for the conference

2	<ul style="list-style-type: none"> • Assign chairs to sessions • Prepare first draft of the program and publish the preliminary program on the conference website or send it with any other necessary information to conference registrants • In the program there should be a section that includes information on the IAEA – contact the Treasurer/Executive Secretary for the relevant information
≥1	<ul style="list-style-type: none"> • Prepare presentation folders for distribution to conference participants upon arrival • (There are no specifications for folder design and no imperative to have bags except at request of sponsor.) • Prepare name tags, preferably with information (clearly legible) in this order: Given name in UPPER CASE family name in Lower case; affiliation. • Colour-coded name tags might be desirable: CHO, BoT, VIPs, program committee, other delegates • Avoid using the person’s title or honorific on the name tag as such titles are susceptible to inaccuracies and take up space.
1	<ul style="list-style-type: none"> • Finalize conference program and social activities • Prepare a list of conference participants • List 1: In alphabetical order according to family name; • List 2: by country of origin. • Prepare an Excel file of conference participants including, affiliation, country, email addresses, and forward it to the Executive Secretary before the weekend preceding the conference. • Prepare a supplemental list of participants who are not included in the conference handbook (for whatever reason).
After the conference	<ul style="list-style-type: none"> • Arrange payment to Treasurer • Collate all conference documents (electronic files & prints) and send to Executive Secretary for the record • Arrange for the upload of all the conference papers on the IAEA website • Post the Conference Program on the conference website particularly for the interest of IAEA members not attending the conference. • Complete the Conference Report Form and send it to the Executive Secretary

Appendix C: Suggested personnel speaking at ceremonies

Day	Event	Plan
Sunday	Welcome Reception	<ul style="list-style-type: none"> • Musical performance (background music) • IAEA representative • Host • Sponsor (where applicable)
Monday	Opening Ceremony	<ul style="list-style-type: none"> • Moderator: introduction of performers • Performance • IAEA President • Host • VIP/other guests Host • Performance • Host: Introduction of keynote speaker
Thursday	Gala Dinner	<ul style="list-style-type: none"> • Performance • IAEA representative • Host • VIP/other guests (where applicable) • Sponsor (where applicable) • Dinner • Dance
Friday	Closing Ceremony	<ul style="list-style-type: none"> • IAEA representative • VIP/other guests (where applicable) • Announcement of the Frances M. Ottobre Distinguished Student Scholarship • Representative of CHO for following year's conference • Photos slideshow • Host



Appendix D

Conference Summary Report

Conference dates	
Conference location (city, country)	
Conference theme	
Keynote and invited speakers	
Total number of abstracts submitted (including abstracts for panel sessions)	
# of abstracts rejected	
# of abstracts withdrawn by the author/s (prior to the closing of the program)	
# of paper presentations (in program)	
# of panel session (in the program)	
# of workshops	
# of non-delivered presentations	
# of countries participating	
# of international attendants	
# of local (daily) attendants	
Total number of attendants	
Total payment to IAEA	
Problems encountered during the planning and the carrying out of the conference:	
<ul style="list-style-type: none"> • 	
Recommendations to IAEA Board of Trustees:	
<ul style="list-style-type: none"> • 	

Recommendations to succeeding hosts:

-

Completed by: _____

Date: _____