WORLD CONGRESSES
&
AREA CONFERENCES
GUIDELINES

Rio de Janeiro, September 19, 1998

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IAFEI WORLD CONGRESSES GUIDELINES

The following guidelines have been approved by the Board of Directors in Rio de Janeiro on September 19, 1998, Chairman of the Committee, Romano Guelmani. These Congresses & Conferences Guidelines are effective as of the Sidney World Congress (October 2000).

1. It is the intention of the Iafei to hold a World Congress each year. The Congresses will normally be rotated among Areas each year.

2. Congresses are organized on behalf of Iafei by an organizing Member Institute with the approval of the Iafei Executive Committee and the final ratification by the Iafei Board of Directors.

3. Application to host World Congresses should be made in writing to the Congresses and Conferences Committee (CCC). The application should be made five years in advance of the year of the Congress and contain proposals for:

   - Iafei .....th World Congress
   - dates, at a minimum - month and year
   - venues
   - a program preview stating the general theme of the proposed Congress

   General themes of Congresses and Conferences may change over the five year period. Exact dates may have to be firmed up after the application approval when the hotel and/or conference sites are committed to.

4. The CCC will preselect the Institutes' candidates to the organization of World Congresses and submit those candidates to the Iafei Executive Committee once a year. The Executive Committee will approve/reject the applications after hearing the CCC advisory report.

5. Following approval by the Iafei Executive Committee and ratification by the Iafei Board of Directors of the application for a World Congress, the Host Institute shall:

   a. Form an Organizing Committee
   b. Make a final selection of hotel or hotels and of Congress facilities, if outside the hotel(s)
   c. Set the exact date for the Congress
   d. Formulate the final theme title a minimum of two years in advance
   e. Publish a preliminary program a minimum of one year in advance

f. Submit the budget for the Congress to the CCC a minimum of six months in advance

IAFEI AREA CONFERENCES GUIDELINES

1. It is the intention of Iafei that each Area will hold an Area Conference at least every two years. The Area that is hosting a World Congress will not host an Area Conference in the year of the World Congress.

2. Conferences are usually hosted by a Member Institute of the Area. Each Conference is organized on behalf of the Area Federation to which it belongs, or - if no Federation exists in the Area - on behalf of Iafei.

   Conferences should be approved by the Area Federation and Iafei. Applications should be made to the President of the Area at least two years in advance. After review the Area President will forward the application to the CCC which will review and submit it to the Iafei Executive Committee for approval and then to the Iafei Board of Directors for ratification.

   The application should contain the following:

   - Iafei ..... Regional (or Federation) Name
   - dates, at a minimum - month and year
   - theme title
   - organized by: Organizing Member Institute
   - place to be held

3. The CCC will have the duty to assist and make recommendations to the Host Institute Organizing Committee.

4. Following approval of the application for a Federation or Area Conference by the Iafei Executive Committee and ratification by the Iafei Board of Directors, the Host Institute shall:

   a. Form an Organizing Committee
   b. Make a final selection of hotel or hotels and of Conference facilities, if outside the hotel(s)
   c. Set the exact date for the Conference
   d. Formulate the final theme title a minimum of one year in advance
   e. Publish a preliminary program a minimum of one year in advance
   f. Submit the proposed budget for the Conference to the CCC a minimum of six months in advance.

IAFEI CONGRESSES & CONFERENCES COMMITTEE

1. The Iafei Congresses & Conferences Committee (CCC) is the authorized agent of the Iafei Executive Committee and of the Member Institutes Organizing Committees for all matters related to the organization of Iafei World Congresses and Area Conferences.

2. Membership includes elected, statutory and advisory members.

- Chairman: he shall be member of the Iafei Advisory Council. He is appointe by the Iafei Board of Directors upon recommendation of the Iafei Executive Committee for a period of three years, subject to renewal.
- Three Vice Chairmen, each representing an Area different from that of the Chairman, are also appointed.
- Other members may be elected as well, based on their experience and interest.
- Statutory member: the Iafei Executive Director and Secretary.
- Advisory members: Chairman Technical Committee and Chairman Sponsorship Committee.

The members of CCC, once elected, operate on behalf of the Iafei Executive Committee.

3. Main duties of the CCC include:

- Consider and submit to the Iafei Executive Committee for approval proposed candidacies and dates.
- Assist the pertinent Member Institute Organizing Committee during the preparation of the Iafei World Congress or the Area Conference:
  - advise on any topic or speaker if it appears that proposed topics or speakers do not fit with the aims and objectives of Iafei or if proposed changes would strengthen the program;
  - assist the Organizing Committee in maximizing delegate attendance from each Institute.
- Monitor constantly the status of the organization of the Congresses/Conferences, including a visit or visits by the Chairman or other representative of the CCC with the Hosting Institutes.
- Ensure that Iafei Committee Chairmen are involved in the development Congress/Conference program.
- Ensure that Member Institutes assist the Organizing Committee in the recruitment of top level speakers.
- Evaluate the proposed program and, where appropriate, recommend topics/speakers for improvement.
- Obtain a full report showing the financial results of the Congress/Conference within six months of the completion. After review and approval, submit the report to the Iafei Treasurer.

4. The CCC should normally meet in person or by teleconference at least twice a year to examine the progress of the scheduled Congresses and Conferences and to advise the Iafei Executive Committee as appropriate.

CONGRESSES AND CONFERENCES OPERATING RULES

1. Programs for Area and World Congresses should be in the same form, covering general topics of current interest in the plenary and workshop sessions.

2. Host Institutes should invite the nomination of speakers from the different Institutes as well as topics to be included in the sessions. This should be done eighteen (18) months in advance. If no answer is received by the Host Institute within three (3) months from the request, the latter may consider the invitation as void and feel free - after consultation with CCC - to choose speakers of its own choice.

3. The names of all proposed speakers should be given to the Institutes of the countries in which they reside. These Institutes should respond as to the qualifications of the speaker if not done on the submission of suggested speakers. If no written response on the qualification is received from a consulted Institute within 30 days from the request, the Host Institute will be free to appoint the proposed speaker.

4. Local Institutes should be prepared to assist the Hosting Institute in the selection and recruitment of top level speakers.

5. The Chairman of the Host Institute Organizing Committee will present a full report on the status of the Congress or Conference beginning two and one half years before it takes place. This report should be submitted to the Chairman of the CCC who, in turn, should make sure that the presentation is made to the Executive Committee of Iafei. The report will be updated every six (6) months, following the same procedure.

6. One year in advance, a preliminary program should be sent to all Iafei Institutes for announcement of the forthcoming Congress or Area Conference to their members.

7. The suggested format of World Congresses is as follows:

   - The Congress should normally last two and one half (2 1/2) days
   - The Opening Ceremony shall last no more than thirty (30) minutes. There shall be a short welcome message from the Iafei Chairman, if present. If not, the message shall come from the Iafei Vice Chairman, or the Area President.
     There shall be a short message from the Host Institute Chairman and from a prominent personality of the Country or Area hosting the Congress.
   - A key-note address should be given and be directly related to the general theme of the Congress.

8. To the extent possible, topics covered at the meeting should be original, or not readily available from other sources. The goal is to include innovative discussion of global financial and business issues, incorporating - wherever possible - the work of Iafei Committees.

9. World Congresses and Area Conferences should make every effort to have workshops prepared by Iafei Committees Members and other delegates whose expertise in a specific field of interest will bring new knowledge to the attendees and help them increase their skills in finance and business management.

10. English is the official language of Iafei and of its Congresses and Conferences.

Simultaneous translation from and into English should be available at all World Congresses and Area Conferences. The Organizing Committee is responsible to determine whether translation to/from other languages may be necessary or appropriate for the participating delegates.
The CCC and the Organizing Committee should satisfy themselves that the quality of the translation will be appropriate.
Where possible, all speeches should be obtained in writing and provided to the translator two to four weeks prior to the Congress or Conference meeting dates.

11. At least one luncheon at a World Congress should be free from speeches to allow delegates to talk freely among themselves.

12. The Closing Ceremony shall last thirty (30) minutes or less.
The Chairman of Iafei should thank the Hosting Institute on behalf of the delegates.
The Chairman of the next World Congress should make a short presentation.
The Chairman of the Nominating Committee should announce the new Iafei Officers.
The Chairman of the Hosting Institute and/or the Chairman of the Organizing Committee will officially close the Congress.

The head table set-up for the Closing Ceremony should include the Officers of Iafei as well as the Host Institute and Congress personnel.

The above guidelines will apply to both World Congresses and Area Conferences, as appropriate.

13. A printed brochure with the full Congress program, accompanying persons' program, registration forms, and hotel reservation forms should be in the hands of the Institutes no later than eight (8) months before the date of the Congress or Conference. It is not necessary to have elaborate, color, printed brochures: it's optional for the Institutes.

14. Sponsorships from various businesses or associations are encouraged.

15. The Hosting Institute is responsible for setting and collecting Congress or Conference fees from delegates and accompanying persons in its own name and its own authority.
It should seek the advice of the CCC when setting up the amounts of these fees.

16. A Member Institute will not receive a financial contribution or subsidy from Iafei for the Congress or Conference it is hosting.

17. All Member Institutes hosting a Congress must pay a levy to Iafei from the Congress fees collected; this levy shall be a fixed minimum of Swiss Francs 5.000 plus 5% of the total registration fees collected from all delegates, accompanying guests and other paying participants.

The 5% of total registration fees is limited to a maximum of 50% of any profit made in the Congress: in case of Congress loss, only the basic fixed minimum of SF 5.000 will apply.
The amount due shall be paid to Iafei Treasurer no later than six (6) months after the end of the Congress. To this end a report of the Congress - showing the calculations of the financial results compared to budget - must be submitted to the CCC which will review and approve the report, inform the Organizing Institute and forward a copy of the approved report to the Iafei Treasurer (see Annex 1 - Congress/Conference Report).
The amount due to Iafei shall be paid in the currency used by Iafei to the Iafei Treasurer within six (6) months of completion of the Congress or Conference.

18. The same fees as stated in item 17 apply to Area Conferences except that the fixed fee of Swiss Francs 5.000 is waived. The 5% of total registration fees is limited to a maximum of 50% of any profit made on the Conference. In other words, if the Conference incurs a loss, there is no fee. If a Conference clears only 1.000, the fee to Iafei is limited to Swiss Francs 500 regardless of the calculation of 5% of total registration fees.

19. Current members of the Executive Committee of Iafei (and their spouses) are exempt from World Congress or Area Conference fees. Executive Committee members pay for their own transportation, lodging and non-event meals, as well as post Congress tours.
Iafei Officers in charge (not belonging to the Executive Committee), who are invited to chair panels or sessions or to give a speech, are exempt from fees. They pay for their transportation, lodging, non-event meals, tours and for the fees of their accompanying guests.
Iafei Past Chairmen who are self-employed or who have retired from their companies are entitled to a discount of 50% of the Congress or Conference fees. The same applies to their spouses.

20. The Hosting Institute will normally absorb the transportation and lodging expenses of Congress and Conference speakers and it may exempt additional Iafei Officers or others attending the Congress (or Conference) from its fees, as it deems appropriate.

21. The Hosting Institute of an Area Conference is urged to request the participation of the Iafei Executive Director & Secretary to the Conference and, where possible, the Hosting Institute is encouraged to absorb the travel and accomodation costs related to the Executive Director & Secretary's attendance.

22. The Iafei Executive Committee normally meets twice a year and the Iafei Board normally once a year. These meetings are almost always held prior to a World Congress or a selected Area Conference. The Hosting Institute will provide the meeting rooms and any necessary recording or visual equipment for these meetings. One luncheon and one dinner will be provided by the Hosting Institute, as determined by the Chairman of Iafei. The costs of these events are not deductible from Iafei fees and must be covered in the World Congress or Area Conference cost.

23. At the Iafei Board, the CCC may make the report on behalf of the different Organizing Committees of events due within two years. The Organizing Committee will make every

effort to provide the CCC with reports and promotional materials in advance so that effective presentation can be made. If the Organizing Committee is present, they will deliver their report directly.

24. In all instances, when dates are set for Congresses or Area Conferences, they should not conflict with other Iafei or Area events.

25. These Congresses & Conferences Guidelines will be effective as of the Sydney World Congress (October 10-13, 2000).

ANNEX 1

REPORT OF THE ..... IAFEI WORLD CONGRESS
(or OF THE..... AREA CONFERENCE)
DATE & PLACE
HOSTING INSTITUTE

	Nr. PARTICIPANTS		UNITARY FEES		TOTAL FEES (in SwFr)	
	Budget	Actual	Congress Currency	Sw. Francs Equivalent	Budget	Actual
Local Attendance						
• IAFEI Members						
• Accompanying Guests						
• Non IAFEI Members						
_____	_____	_____			_____	_____
Sub-Total						
_____	_____	_____			_____	_____
Foreign Attendance						
• IAFEI Members						
• Accompanying Guests						
• Non IAFEI Members						
_____	_____	_____			_____	_____
Sub-Total						
_____	_____	_____			_____	_____
Complimentary						
• Speakers						
• IAFEI Guests						
• Others						
_____	_____	_____			_____	_____
Sub-Total						
_____	_____	_____			_____	_____
Total Nr. Participants	_____	_____				
1. TOTAL FEES					_____	_____
2. SPONSORS REVENUES (nr. of Sponsors)					_____	_____
3. OTHER REVENUES					_____	_____
4. TOTAL REVENUES					_____	_____
5. TOTAL COSTS					_____	_____
6. NET PROFIT/ (LOSS) (Line 4 less Line 5)					_____	_____
7. PAYMENT DUE to IAFEI					_____	_____

Signed : _____ and _____
Chairman Organizing Committee Chairman Hosting Institute

Reviewed : _____
Chairman CCC (IAFEI Congresses & Conferences Committee)