

IMEX 2009 Association Day

Monday 25 May 2009

Summary of roundtables discussion

Roundtables organised by MCI



Association Certification

Moderator: James F. Hollan III, CAE

- Certification programmes, properly administered, can establish an important sense of professionalism and basic standards for associations.
- Certification programmes, properly administered, can be an important source of non-dues revenue for associations.
- "Certificate Programmes" are not certification programmes
- Certifications that can be earned by purchasing several classes and/or services so that attendance alone guarantees certification have no real value and are a waste of time.
- Many successful and well respected certification programmes are not certified by any certifying associations or organisations

Committee Management

Moderator: Leigh Wintz, CAE

Roundtable participants shared the following concerns about managing committees:

- Missed deadlines
- Recruiting the right volunteers to do the work
- Relationships with paid staff
- Quality of the work produced

To alleviate these problems, participants agreed that the following were essential to effective management of committees:

- Make sure that the committee's work is tied to accomplishing the goals of the strategic plan; it needs to be important and relevant work in order to engage volunteers
- Review the association's bylaws to eliminate unnecessary committees
- Provide a good orientation for committees that includes a written job description; clarifies the role of staff; financial and human resources available to the committee; expectations concerning outcomes; distribution of reports (who gets copies of the work and at what stages)
- Ask committees to format reports so that they present options and alternatives for the board to consider; not a single recommendation for the board to accept or reject
- When a deadline is approaching, send an email stating, "If we don't hear from you by a certain date, we assume you are in agreement."
- Put "action required" in the subject line of an email
- Use a "call for volunteers" to help match the right people to the right committees and let the potential committee members express the work they are interested in, their preferred methods of engagement (face to face, email, teleconference) and their time availability.

Conference Sponsorship

Moderator: Martin Boyle

- There is a general lack of available marketing budgets within companies, so sponsorship revenues have dropped as a result
- It is getting more and more difficult to get in the door of the right people within identified potential sponsors
- Government regulation is playing a part in limiting what some companies are able to sponsor
- Those with available sponsorship revenue are asking for more and more 'bang for their buck'

Some suggested solutions raised:

- Consider unique sponsorship opportunities, not just the standard 'package offering', and perhaps customise each to the needs of the sponsor
- Look for unique tools that are new to market that get the sponsors' brand exposure in different ways. These may include digital floors, partnerships with digital tracking tools (i.e. spotme). Just be sure that the delegates are clear from the branding message that the association, society etc still owns the conference and that the sponsor's image is a reinforcement of the strong partnership.
- Study your potential sponsors' marketing strategies and learn what values they share with you. If you can pitch the sponsorship of your conference to meet those values and in the same 'marketing language' that they use, then you should have greater success.
- There are several bodies out there that are looking to sponsor meetings of a certain nature and background. Research to identify who and where they are and target them with your personalised campaign. Keep in mind that these bodies have a direct remit and may want to therefore see certain topics covered in your meeting / conference. If you are flexible with the content that is being delivered, a partnership of this nature may be very successful.
- Look for 'unexpected links' between existing clients and sponsors. For example, you may be working with a sponsor who also shares a marketing initiative with one of their 'strategic partners or alliances'. Are there opportunities for your meeting / association to get in front of this partner to share knowledge and contacts. In other words, is there something of added value your association is able to provide your sponsor that will help their relationship with this 'partner' and visa versa?
- Know your sponsors and keep up to date on what is happening in their industry. Don't just assume that if you are running a medical meeting, pharma's will support you or if you are coordinating a technology exhibition that the big tech manufacturers will be there.
- Given the reliance and priority sponsorship revenue is for associations and societies, it was suggested that larger associations need to recruit and / or train an expert (or a team of experts) whose sole responsibility should be sponsor relationship management. If you are not in a position to do so, then look to companies who provide sponsorship management strategies and assistance. Reputable expert sponsorship and exhibition support companies will take the time to get to know your associations' goals and targets to ensure they target appropriate partners for your meeting. They will sometimes do so on a commission basis as well, so there's a real win-win for all.

Moderator: James F. Hollan III, CAE

- Many companies that could previously be counted on as major event sponsors have completely withdrawn sponsorship support. In particular, many banking and financial management firms no longer sponsor at all.
- Many other large sponsors have greatly reduced their level of sponsorship.

- Some associations are finding success in responding to this problem by:
 - Partnering with other associations to share events
 - Providing complimentary exhibition space or expanded exhibition space as part of the sponsorship package
 - Providing more group exhibits to allow for a smaller entry fee to those who would like to exhibit and sponsor
 - Creating more shared sponsorships
- It is not clear to the participants that this current economic situation is a short term occurrence or a long term pattern we must learn to live with.

Conference VAT

Moderator: Richard Torriani

- Important aspect of congress finances representing up to 20% of costs
- Usually fairly simple to manage if the correct structure implemented from the outset
- Some countries longer and more difficult to manage than others
- Basic concept is to imagine that you are running a small business in the destination country
- VAT only worth recovery above a certain budget amount +-400.000 Euros otherwise cost and effort outweigh recovery amount
- Be careful of advice from government as meetings industry is very specific, often best to consult local PCO

Moderator: Caroline Mackenzie

- VAT – what is it? This was generally discussed as to what VAT was. That isn't a tax that is applied on services generally in the place that which the service is delivered. The rate ranging depending where in the world you are working and on the type of services as this can vary. Generally in Europe it ranges from 15 – 22%
- Do you have to VAT register, almost always if your expected income exceeds approx 70,000 Euro
- Is there consistent legislation as to how VAT is applied, rates etc. No it varies from country to country.
- What does it apply to – generally sponsorship, exhibition and registration fees
- Registering for VAT and reclaiming VAT on expenditure – we discussed how this can be handled. Using a local PCO can be advantageous as they generally are familiar with the required procedure in that country and / or can access the correct advice. Often they can also facilitate the VAT registration, returns etc.
- Issuing of VAT Invoices – what information needs to be included of the invoice. VAT registration number and the amount of VAT included within the invoice and the rate of VAT

Corporate Social Responsibility

Moderator: Greta Kotler

- There are varying definitions for CSR, but at least it should include social, economic, and environmental considerations. Often, it was noted, CSR discussions go quickly to environmental and “green” when it can/should be more expansive
- Some of the organisations’ overall purpose is very consistent with CSR while others are not. In either case, it is important to take deliberate actions towards CSR.
- One should be careful not to making CSR a “buzzword” and incorporating everything into it just to fit within a trend.
- Participants shared examples of CSR initiatives within their organisations. All agreed that communication and doable initiatives were very important to moving this broader agenda further.
- For more information, we have included a link to “Global Principles for Socially Responsible Associations“ www.asaecenter.org/SRprinciples. This document provides additional definition and guidelines for organisations. ASAE & The Center for Association Leadership currently have 115 organisational signatories to this document.

Delegates ROI

Moderator: Marteen Vanneste

- How to measure?
- Ellig Hamso, ROI methodology Jack Philips. It is more about Corporate ROI, than Delegate ROI
- ICCA and Ellng Hamso are developing a Delegate ROI methodology.
- How about Exhibitor’s ROI? Some see a real big change: challenging the Stand spend ...
- Start with analysing the Delegates needs
- How to run surveys?
- Case: a smaller conference was tested: participants and sponsors were asked and this led into an increase in satisfaction level
- The value of NETWORKING:
 - Peer to peer: smaller group, specialist topics > more individualised contact but must always attract the right speakers.
 - Or larger groups (where delegates are buyers and also sellers)
- If the size of the venue is too big: participants don’t meet their peers.
- In large medical congresses the ‘sponsor’ takes groups away and the networking goes down
- Can we teach delegates on how to plan, set objectives, and measure to optimise their conference participation

Education Programme Development

Moderator: Greta Kotler

- In most of our organisations, volunteers participate in the setting of the education agenda through their work on committees, task forces, and other entities that oversee content at meetings and events.

- We need to make “education” essential and not just “nice to do” to maintain participation, especially during difficult economic times.
- Having a certification or creating certificate programmes with specific requirements helps to organise content and achievement for attendees.
- Many groups are exploring “on-line” learning and there was substantial interest in this experience, how it works, and what specific offerings are successful.
- In this regard, some reservations were expressed regarding putting materials online, specifically in some of the medical fields.
- We need to also be aware of social media and how it may be used in developing educational programming in the future.

Moderator: Marteen Vanneste

- Many of us have learned on the job.
- SEFI method is a German method of learning by Living the ‘problem’.
- Needs Facilitators that really know the content. Discussion about how to solve the problem.
- Works best with own cases, self written.
- ‘Living Case’ method. Present your own case and solve the problem with others.

HOW TO DEVELOP EDUCATION OBJECTIVES?

1. Select a group that comes up with topics, develop competency model, core competencies, curriculum.
2. Pick Hot topics
3. Analyse audience
4. Select the participants for optimal education (homogenous or mixed)

Event Marketing

Moderator: Hunter Clemens

- Marketing an event is more important than ever in these challenging economic times
- The message has to be clear and customised to each audience
- Marketing spending must be increased, compared to previous years, to get the message across
- The message has to convince attendees and exhibitors/sponsors that if they could attend only 1 event this would be the one
- Social networking media (Twitter, Facebook, Xing, LinkedIn...) can/should be used
- Print is declining except where necessary
- Cross-promote with similar organisations
- Use services such as ‘MagnetMail’ to e-market, track results; and focus on those that click through to your website.

Moderator: Caroline Mackenzie

- Access to quality Data – discussions around difficulties of accessing new data and simply churning old lists of attendees or current membership lists. Discussions then evolved how to access new qualified data whilst conforming with each country's varying data protection acts. There was discussion on how associated markets could be accessed cost effectively using contra deals and how it might be worth spending some money on properly researched and qualified data from marketing houses etc.
- The Human Factor – we discussed how this was often undervalued yet could be one of your most cost effective and valuable mechanisms of promotion. Creating international Ambassadors within your committees or federation, who may sit on other committees, speak at other events, travel to other congress who can also be promoting your association / conference as part of their

activities. These people are not paid and they can be equipped with collateral, slide templates etc and be very effective communicators to create awareness

- Use of Social / Business networking tools in today's conference and association communities. We discussed a number of the popular platforms including face book, linked-in, MySpace, YouTube and twitter as well as regular blogs and how these can be effectively utilised for differing types of marketing activities and to differing audiences in today's conference and association marketing campaigns.
- Hard Copy Marketing Collateral – we discussed whether having printed material this was still a requirement of promoting and association and conference. It was agreed that e communications and e brochures were much more prevalent and cost effective and it was a question of knowing your market and whether your audience was comfortable in working purely with e documents. It was felt in the main that there is still a place for hard copy promotional items to help create a brand awareness, you use as inserts, bag drops etc but generally these were much less in quantity and shorter in size with the main function of awareness to drive people to access a website where much more current and detailed information can be carried.
- Contra deals – when budgets are being cut we discussed how contra deals can be used as a cost effective method of marketing. It was agreed that these could be a good mechanism to access related and extended markets and could be a cost effective method of marketing. The area to pay attention to is what you are offering in return to be clear what cost implication it has to you.
- Bulk emailing – this seemed to be a challenge for a number of those participating in the session. Either high number of bounce backs, data protection compliance, volume mailing and proper statistical reporting. We therefore discussed the options of outsourcing these mailings to specialist mailing houses who have the sophisticated technologies to handle this type of volume marketing effectively and generally for relative small costs.
- We also discussed accreditation as an effective marketing tool. CME / CPD is becoming a requirement in many professions, Therefore if your event offers accreditation it can be a great attractor for why delegates should attend
- Content, content content – the best marketing tool available is ensuring a strong, interesting current and relevant programme that delegates will want to attend or in terms of attracting membership, ensuring the association is a leader in education, best practice etc that gives value from being a member

Managing Conflicts

Moderator: Sam van de Kerckhof

- Recognise and face the conflict
- Negotiate and provide alternatives
- Clearly define each positions
- Listen!
- Take the conflict as a source of resources and creative inspiration of innovation

Moderator: Lina Alaa Al Deen Nazmi

DEFINITION

Conflict is a natural disagreement resulting from individuals or groups that differ in attitudes, beliefs, values or needs.

INGREDIENTS OF CONFLICTS

- Needs - Needs are things that are essential to our well-being. Conflicts arise when we ignore others' needs, our own needs or the group's needs. Be careful not to confuse needs with desires (things we would like, but are not essential).
- Perceptions - People interpret reality differently. They perceive differences in the severity, causes and consequences of problems. Misperceptions or differing perceptions may come from: self-perceptions, others' perceptions, differing perceptions of situations and perceptions of threat.
- Power - How people define and use power is an important influence on the number and types of conflicts that occur. This also influences how conflict is managed. Conflicts can arise when people try to make others change their actions or to gain an unfair advantage.
- Values - Values are beliefs or principles we consider to be very important. Serious conflicts arise when people hold incompatible values or when values are not clear. Conflicts also arise when one party refuses to accept the fact that the other party holds something as a value rather than a preference
- Feelings and emotions - Many people let their feelings and emotions become a major influence over how they deal with conflict. Conflicts can also occur because people ignore their own or others' feelings and emotions. Other conflicts occur when feelings and emotions differ over a particular issue.

THE 5 STEPS TO MANAGING CONFLICTS:

1. Analyze the conflict: The first step in managing conflict is to analyze the nature and type of conflict.
2. Determine management strategy: Once you have a general understanding of the conflict, the groups involved will need to analyze and select the most appropriate strategy.
3. Pre-negotiation: To set the stage for effective negotiation, the groundwork must be laid. The following should occur prior to negotiation: initiation, Assessment, Ground rules and agenda, Organisation & Joint fact-finding.
4. Negotiation: Should include: interests, Options, Evaluation, Written agreement & Commitment
5. Post-negotiation: Once negotiation is complete, the group will need to implement the decisions made. Some key steps include: Ratification, Implementation & Negotiation skills

CONCLUSION

- Conflict is not always negative. In fact, it can be healthy when effectively managed. Healthy conflict can lead to...
 - Growth and innovation
 - New ways of thinking
 - Additional management options
- Conflict Management Strategies
 1. Collaboration: This results from a high concern for your group's own interests, matched with a high concern for the interests of other partners.
 2. Compromise: This strategy results from a high concern for your group's own interests along with a moderate concern for the interests of other partners.
 3. Competition: This strategy results from a high concern for your group's own interests with less concern for others
 4. Accommodation: This results from a low concern for your group's own interests combined with a high concern for the interests of other partners.
 5. Avoidance: This results from a low concern for your group's own interests coupled with a low concern for the interests of others.
- Interest vs. Position

People often confuse interests with positions. An interest may be reducing litter in roadside ditches. There are many possible ways of addressing this interest. One might be the position of mandatory recycling. Another position might be a deposit on bottles and cans. Still another could be organising a clean-up day.

- Focus on interests, not positions.

Focusing on interests, rather than positions, makes it possible to come up with better agreements. Even when people stand on opposite positions, they usually have a few shared interests. It takes time and effort to identify interests. Groups may not even be clear about their own interests. It helps to write down each group's interests as they are discovered. It helps to ask why others take the positions or make the decisions they do. Partners will have multiple interests. Interests involving important human needs (such as security, economic well-being, a sense of belonging, recognition and control over one's life) are difficult to negotiate.

- Some obstacles to developing innovative options are:

Judging and rejecting prematurely
Searching for a single best answer
Putting limits on scope or vision
Considering only your own interests

- Develop optional solutions.

When developing optional solutions that meet the interests of all sides, try to meet as many of each side's interests as possible. Start by inviting all sides to brainstorm ideas (before reaching a decision).

- Developing objective criteria.

When developing criteria for selecting or combining possible alternatives, revisit the conflicting interests. These can't be ignored or "wished" away. Instead discuss them as you begin developing criteria for judging alternatives. Also keep in mind principles such as fairness, efficiency and scientific merit. Strive for criteria that are legitimate, practical and unbiased. You may also find it helps to explore the criteria used in making past decisions and discuss criteria with your partners or outside experts.

- Avoiding a disagreement doesn't make it go away. We need to be aware of conflict and make decisions about what we are going to do about it. Conflict becomes negative only when it is not approached and resolved.

GOLDEN RULES IN MANAGING CONFLICTS

- **Accept the fact** that conflict is going to happen. Decide to take positive steps to manage it. When it occurs, discuss the conflict openly with the group.
- **Deal with one issue at a time.** There may be more than one issue involved in the conflict at one time. Someone in the group needs to provide leadership to identify the issues involved. Then only one issue at a time can be addressed so the problem is manageable. If there is another problem from the past blocking current communication, list it as one of the issues in this conflict. It may have to be dealt with before the current conflict can be resolved.
- **Choose the right time** for the conflict. Individuals have to be willing to address the conflict. We are likely to resist if we feel we are being forced into negotiations.
- **Avoid reacting to unintentional remarks.** Words like "always" and "never" may be said in the heat of battle and do not necessarily convey what the speaker means. Anger will increase the conflict rather than bring it closer to resolution.
- **Avoid resolutions that come too soon** or too easily. People need time to think about all possible solutions and the impact of each. Quick answers may disguise the real problem. All parties need to feel some satisfaction with the resolution if they are to accept it. Conflict resolutions should not be rushed.
- **Avoid name calling and threatening behavior.** Don't corner the opponent. All parties need to preserve their dignity and self-respect. Threats usually increase the conflict and payback can occur some time in the future when we least expect it.
- **Agree to disagree.** Respect for one another and the value of relationships are two good reasons to disagree, but to choose not to allow the disagreement to interfere with the group.
- **Don't insist** on being right. There are usually several right solutions to every problem.
- **Humor and Conflict.** Laughter can effectively relieve tension in conflict situations. A well-timed joke can refocus conflict negotiations in a positive direction. Laughter gives people time to rethink their positions and see alternatives that may not have been obvious before.

Managing PCOs

Moderator: Emma Aru

- Work on a long-term contract PCO when the local committee is not willing to take the final risk of the operations
- Work with the local organisation and local DMC-PCO. In this case the full organisation and the risk of the activities are in the hands of the headquarters
- Select a well-established international PCO to support to local organisation with limiting the 'risks'

Moderator: Sam van de Kerckhof

- IS the PCO managing the client or the client managing the PCO? It's a PARTNERSHIP
- Clear job description. Detailed contract provides clear relation between the partners
- Define and respect line of interests
- Transparency and trust

Relationships with Global Organisations

Moderator: Emma Aru

- Lobbying & Public Affairs
- Customer relationship management
- Public relation
- Knowledge and expertise
- Business development
- Social responsibility

Moderator: Megan Freedman

- Activities that partnering sister organisations can engage in:
 - Sell the products and services of sister organisation (in other countries)
 - Invite colleagues from other countries to meetings / conferences
 - Knowledge exchange
 - Marketing – to raise awareness, need to work through local organisations outside home country
- Challenges:
 - How partnering organisation's stay mutually beneficial?
 - Membership – organisations unwilling to share membership lists
 - If there is no national organisation / alliance of a profession, very hard to form an international alliance