

## ENGLISH TEACHERS' ASSOCIATIONS AND IATEFL SPECIAL INTEREST GROUPS: ORGANIZING JOINT EVENTS

### OVERVIEW

By Sara Hannam, IATEFL Associates' Coordinator

At Associates' Day in Harrogate (2006), a session was held on how Teachers' Associations (TAs) who are part of the IATEFL Associate Network can organize joint events in their locations around the world with one of the IATEFL Special Interest Groups (SIGs). During that session, the TA and SIG representatives present felt that some guidelines were necessary to clarify how such events could be organized and to draw together past experience with the aim of improving future collaboration. Some of the information presented here was taken from previous documents still in circulation, and the rest of the information has been collected specifically for the purposes outlined above. I would like to thank: Glenda Smart (Executive Officer, IATEFL), Sandie Mourao (SIG Coordinator, IATEFL) Colin MacKenzie (Teacher Development SIG Coordinator, IATEFL), Karen Field (Chair, TESOL Macedonia Thrace, Northern Greece), Evan Fredo (Former IATEFL Secretary) for their input and help in compiling this information.

I felt what might be most useful for both SIGs and TAs considering embarking on a joint event, would be access to some personal experiences from both perspectives as well as a checklist of action points that need consideration as the process unfolds and could help in ensuring success. This text will therefore be divided into 6 parts:

- (i) Reasons for and advantages of holding a joint event
- (ii) Organizing a joint event: SIG perspective
- (iii) Organizing a joint event: TA perspective and
- (iv) Action Plan: Summary
- (v) Sample Budget
- (vi) Sample Agreement from Business English Special Interest Group (BESIG)

(i)

### REASONS FOR HOLDING A JOINT EVENT

- ✚ TA decides it wants to organize a one-off event in a particular part of the world on a specific area of ELT e.g. Global Issues, and approaches the relevant SIG Coordinator (details on IATEFL website at [www.iatefl.org](http://www.iatefl.org))
- ✚ TA decides to organize its conference on a specific area e.g. Teacher Development, and approaches the relevant IATEFL SIG Coordinator
- ✚ TA decides it wants to have a specific SIG track as part of its annual conference e.g. Learner Autonomy track running parallel to the main conference (often with the help of a local TA SIG). The local TA SIG approaches the relevant IATEFL SIG Coordinator
- ✚ IATEFL SIG is interested in having an event in a particular part of the world and approaches the President of the local TA (details can be found on IATEFL website at [www.iatefl.org](http://www.iatefl.org) under Associates' listing)

### ADVANTAGE OF HOLDING A JOINT EVENT

- ✚ Many IATEFL members are non-UK based. More joint events increases the opportunity for such people to participate
- ✚ Local events serving local needs increases overall understanding of IATEFL SIGs and the professional as a whole of the different settings in which teachers work
- ✚ Local events provide an opportunity for meeting classroom teachers who may not be able to attend conference. More Non-Native English Speaker Teachers (NESTs) are likely to be present
- ✚ Local events provide an opportunity for increasing membership of both the local TA and IATEFL (and related SIGs)
- ✚ Local events enable the sharing of expertise i.e. SIGs can often provide external speakers to complement local speakers, TAs can share specifics of local teaching context
- ✚ A shared event is easier to organize
- ✚ A shared event carries less financial risk

(ii)

### **ORGANIZING A JOINT EVENT - THE SIG PERSPECTIVE**

By Colin MacKenzie, IATEFL Teacher Development SIG Coordinator

#### **TAs and SIGs working together: A personal (and incomplete) view**

Organising a joint event between a Special Interest Group and an Associate Teaching Association is a great experience. It combines the local knowledge and enthusiasm of the TA and the international reach and specialized knowledge of the SIG. It is also a good thing as it means two of the major branches of IATEFL coming together. I am going to outline what I feel is one of the best ways of going about this giving examples from a successful event put on in October 2006, Tools for Professional Development (TPD) was a one day event organised by Michaela Tronva and Bohdana Navratilova of MSATE (Moravian and Silesian Association of Teachers of English) with a tiny bit of help from myself and the IATEFL Teacher Development SIG. It was held on 7th October 2006 In Ostrava, The Czech Republic.

First the TA and the SIG have to find each other. A TA has to have an idea of what kind of event would appeal to teachers in their locality and the SIG has to think about where it might want to put on an event, though the SIGs are willing to go just about anywhere. Then it's a question of getting in contact. While contact details are listed in the back of Voices, personal contact is quite important, it always helps to have met the person you are working with. The ideal place for this to happen is at the IATEFL Annual Conference as the five day event gives a real opportunity to meet and work out a few details. Additionally, you can contact Sara Hannam the Associates' Coordinator, and ask her to put you in touch with the right person.

The SIG Coordinators are constantly saying they would like to work more with the TAs, and I'm sure the reverse is true also, but it is actually quite difficult to move from a general "We'd like to work with you", to getting in touch with the right person, or even knowing who the right person is. I feel that this is perhaps the TAs' responsibility to initiate contact as they are more likely to know what kind of event will appeal to teachers in their region. In the case of TPD, Michaela and I met at the Associates Day in Cardiff, where I had said that all the SIGs would be happy to put on events with TAs and later at the same conference at the TD SIG Open Forum, where I reiterated it. This personal contact and repetition of the message helped us to start working together.

Once the two parties have decided that they want to go ahead then I think the first thing to do is set a date and decide on the length of the event. For me this needs to be far enough in the future to give a chance of really working on it but close enough to maintain a certain sense of urgency. Many of the initial decisions seem naturally to come from the TA. It is they who know the local market so they should have the majority voice in deciding the length of the event and the price local teachers will be prepared to pay. They should also have an idea of the kind of topic that would appeal. It is also pretty much up to them to find the venue.

What is really important at this stage is laying out the lines of communication. Just having one person speaking for the TA and one for the SIG seems essential at the beginning. TD SIG has come a cropper in the past when having to deal with three people who had a problem agreeing on how the event should be run, and none of whom were the original person who had suggested the event; this was compounded by the fact that the event was being put on jointly with another SIG, which had two representatives; This said it is also important that the TA representative has a good team supporting them, presumably the TA's Committee.

Perhaps equally important is checking that everyone knows their own responsibilities and some kind of rough timetable is established. You have to make it clear who is going to do what and when otherwise vital things can get forgotten. Ideally at this stage much of the planning will be done consultatively so as to help build up a good working relationship and to ensure that things get done.

So, having decided on the venue, title, date and length it's time to get down to some work. This is where the SIGs can add something. Calls for papers, registration forms, publicity are things that the SIGs generally have experience of. They can also have a look at their members in the country of the event and see if any of them can help through giving advice or whatever; In the case of TPD, we found a plenary speaker among local TD members.

Finding sponsorship and publishers willing to support the event worked best for us on a local level. The British Council, major publishers and the like have local budgets that are probably more easily tapped into than international ones. Here again, for TPD, it was advantageous that Michaela had prior experience of putting on an event as it meant that



she already had contact with the publishers and the BC. The British Council in particular seems to like to aim at regional events rather than national and here a SIG can bring a bit more of an international feel to an event.

One thorny issue can be sharing the risk or profit. IATEFL SIGs have to aim to at least break even from an event and submit a budget to the head office before each one. It has to be established, sometimes in a written contract, who is underwriting the event.

What seems to be a major role for the SIG is finding suitable plenary speakers. Teachers seem to want a name. Generally we try to balance a more local name with an international one for plenaries. This often depends on the personal contacts of the SIG Coordinator. Some Coordinators have better connections than others.

From then on it's very much a question of keeping the channels of communication open, trying to follow your timetable and perhaps most importantly, providing mutual support. It can be very lonely organizing an event and knowing that someone is in there with you is reassuring. Michaela and I found that we were in contact almost every day at certain key times and that regularly informing each other of what was going on helped in the successful running of the event.

Some things that could be considered the TA's responsibility, with help and advice from the SIG of course, are: contacting publishers and sponsors, contacting hotels and other accommodation providers, organising catering, organising the social programme, writing up transport instructions, local publicity. The SIG might be responsible for international publicity and liaison with the IATEFL HO

Shared tasks might include notifying prospective presenters of acceptance and their time slot, processing registration forms, writing the programme. Expectations for after the event have to be made clear beforehand. Does either side expect proceedings to be published? Who is going to chase up feedback?

At the event responsibilities again have to be clear. I think it is the privilege of the TA, as hosts to open the event and introduce the first speaker but the SIG representative should be up there too and make sure that IATEFL are mentioned. Good communication has to continue during the event and here the rapport built up at the beginning will pay off.

### **(iii) ORGANIZING A JOINT EVENT: THE TA PERSPECTIVE**

**By Karen Field, Chair, TESOL Macedonia Thrace, Northern Greece**

**“Coming together is a beginning, keeping together is progress, working together is a success” (Quote by Henry Ford)**

Despite the concerted efforts of voluntary Executive Board members, non - profit Teaching Associations (TAs) can face what sometimes seems like a constant uphill struggle. This is particularly the case when attempting to provide loyal members with some fresh ideas and stimulation while simultaneously trying to entice new members to join the association by offering services which support and enhance their professional development as teachers.

One solution that TESOL Macedonia - Thrace, Northern Greece (TESOL NG) found beneficial to all involved was to organise a joint event in collaboration with the IATEFL Learner Autonomy SIG (IATEFL LA SIG). At our 14<sup>th</sup> annual convention entitled “The Whole Professional: Rethinking Teaching In and Out of the Classroom” held in Thessaloniki over the last weekend of September 2006, the IATEFL LA SIG provided a half day of workshops and presentations based on learner autonomy which culminated in the opening plenary of the convention in the evening, using one of the LA SIG keynote speakers. It all ran very smoothly on the day itself and the feedback from those in attendance was both of appreciation and satisfaction.

The starting point for something like this is actually making contact with the people responsible. Fortunately, TESOL NG was approached by Carol Everhard, the IATEFL LA SIG coordinator, way back in December 2005, who enthusiastically suggested a joint event of some nature. The Executive Board eagerly agreed and boldly decided to turn their annual convention into a three day event with the IATEFL LA SIG providing the sessions on the first day and also the opening plenary speaker for the convention. Ten months planning time may seem like plenty of time - with proper organization it is enough time but only if certain issues are taken carefully into consideration.

Having decided together (both TA and SIG) to proceed with the joint event it is vital to appoint someone from both sides, in particular from the TA, who is to be solely in charge of communication between the two parties. An idea may be born overnight but putting it into practice takes time, patience and a great deal of effort and there will definitely be a barrage of emails, phone calls, text messages and so forth throughout the preparation period that need immediate attention. It is essential that the time given for organising such an event be taken into account and that certain decisions, despite being discussed between the two liaison officers, may not be able to be enforced immediately. TAs are usually bound by their constitution which dictates that a board discussion take place and a vote be cast prior to any final commitment. This can become somewhat time consuming, especially in the final stages, however, it is imperative for all concerned to sit around the table and iron out creases and insist on finalizing details at regular intervals. It is very easy for lines to get crossed and misunderstandings to surface and so as to avoid any misinterpretations a line of communication must be established.

It is usually the TA who initially takes the brunt of the decision making. This is due to their knowledge of the local market and their previous experience of organising an event of this type. Naturally, any decisions are made in agreement with the SIG. At the convention TESOL NG provided the venue and spearheaded the promotion and advertising of the event at a local and national level. The LA SIG took on the international promotion along with IATEFL. As the LA SIG plenary speaker was also our convention opening plenary, TESOL NG provided the relevant sponsorship here. We were also very fortunate to have the guidance of IATEFL Associates' Coordinator, Sara Hannam, whose advice and contribution both in the preparation and participation of the event were very much appreciated.

Obviously it is not in anyone's interests for financial issues to cause problems before, during or after such events. It is therefore of great importance that these matters be transparent and determined early on in the planning stages. It is all well and good verbally agreeing to certain figures but it might in the long run be more feasible to have certain key features of the financial plan clarified in writing. This ensures that nobody feels their toes are being stepped on and it guarantees a willingness to embark on future endeavours.

At our event, IATEFL LA SIG, with Carol Everhard at the helm, organised an impressive programme of international presenters who specialise in the field of learner autonomy for the Friday pre-convention sessions. The event was well attended and appreciated by all. TESOL NG were also privileged to be able to use some of the international speakers, who willingly stepped in to fill last minute cancellations over the convention weekend.

It remains to be said that there is a vast amount of work needed, by all involved, to achieve the desired end result but do not let this deter you. I personally believe that TAs should encourage joint events at all levels and with various interested parties. It means that in certain cases the workload in planning such an event is in fact shared. Also members of TAs are given the opportunity to expand their knowledge and to develop professional intuition in certain unfamiliar areas of the ELT world.

There probably is no magic formula for guaranteeing success with these kinds of events but the following may be used as guidelines.

- ✚ Decide on feasibility of joint event - must be beneficial to all involved
- ✚ Create established lines of communication
- ✚ Transparent and definite agreement over financial issues

**(iv) Some Guidelines for Joint Events - by Colin MacKenzie, Coordinator, IATEFL Teacher Development SIG and Sara Hannam, IATEFL Associates' Coordinator**

### Pre-planning

- ✚ **Contacts:** Make it clear who the contacts for the SIG and for the TA are, and have only one of each.
- ✚ **Type of event:** Establish that you are both interested in the same type of event. Think carefully about predicted number of participants and length of the event (i.e. one day, weekend - will there be a need for catering?).
- ✚ **Theme:** Agree on a theme for the event - often related to SIG interests

- # **Venue:** It is advisable to have two or three different possible sites in mind at the planning stage so that you can compare suitability and prices
- # **Tasks:** Establish early who is going to do what, initially many tasks should be shared to build confidence. Try to utilise the skills that you have available from those people on board at this time and get individuals working to their strengths
- # **Profit:** Decide on the risk and profit share to avoid conflict later. It may be advisable to put this in writing to avoid any misunderstanding after the event (see model contracts at end of this section)
- # **Communication:** Establish good lines of communication - lots and regular at the beginning so it becomes a habit and everyone gets to know each other
- # **Other help:** Involve others, the TA committee and the SIG committee. This will give rise to a shared feeling of success and many hands make light(er) work.
- # **Budget:** Write a preliminary budget. There's no point in embarking on something that will make a loss. Check possible sources of funding early. This budget must also be approved by the Treasurer of both the TA and the SIG and the event will not take place unless both the treasurers have agreed the financial outline. This should therefore be one of the areas that is tackled first.

## Preparation

- # **Date:** The TA should know what suits local teachers in order to maximise attendance, the SIG when there will be conflicts with other IATEFL events.
- # **Venue:** Once suitability has been established, book early to ensure you can then advertise the event ahead of time. Make sure equipment and refreshment needs have also been covered
- # **Plenary Speakers:** Get them early as good speakers can be booked up in advance. One "local" and one "international" is often a good mix - though a local speaker who has an international profile keeps costs down. Good speakers need to be booked well in advance and often have busy timetables.
- # **Timetable of Speakers:** Be realistic about how much can be fitted in to the event. Leave enough time for breaks and change over - remember people attend events to socialise too and will want to have time to network without having to miss the talks
- # **Funding:** It seems to work better if funding and sponsorship is organised locally - it's easier to build a personal relationship. TAs need to share information about usual sources of funding e.g. publishers, and these organizations need to be approached early on
- # **Publicity:** Produce the Call for papers and registration form quickly (the SIG should have examples from past events - if not other SIG coordinators can be approached). Publicity should be regularly sent through all possible channels (to local institutions for the TA; to all members and multiple discussion lists for the SIG, to IATEFL Voices and to ELTeCs).
- # **Local help:** The SIG could contact members who are local directly to ask for their input on the event - IATEFL Head Office can give lists of members by country or region.
- # **Local Info:** The TA should prepare accommodation lists and transport advice for those travelling in from abroad or in other areas of the target country

## At the Event

- # **Share responsibility:** It's very easy to let the TA people do all the work as they are on the ground. The SIG representative has to be careful that they do enough to help and should ask for specific tasks to be shared. If possible, make a list ahead of time indicating who is responsible for what and distribute it to all those in the organization team for easy reference on the day
- # **Contact Details:** Arrange list of participants and contact details to distribute at the event
- # **SIG Information:** For SIGs make sure there is a stall with information on the SIG and jointly organize an IATEFL stall with the TA which advertises the benefits of membership
- # **Keep smiling:** You've done all the hard work; you should just enjoy it now!

- 🚩 **Monitor:** The success of the event as well as what things you might potentially do differently next time around

### Post-Event

- 🚩 **Responsibilities again:** Make sure you know who's going to do what after the event as there are always a number of post-event tasks that need completing i.e. making sure the venue is paid for and a receipt issued, thanking the speakers formally, sitting down and signing off the finances.
- 🚩 **The future:** Based on the success of your event, is it worth repeating? Annually? Biennially?

### (v) A Sample SIG/TA Joint Event Budget (from IATEFL Head Office)

Income	Predicted	Actual
Registration fee IATEFL/host member Non-IATEFL member		
Income		
No of delegates @ member rate		
No of delegates @ non member rate		
Grants/sponsorship		
Publishers exhibition		
<b>TOTAL INCOME EXPECTED</b>		
Expenditure		
Estimated expenditure		
Room Hire		
Speakers' fees		
Speakers' expenses		
Catering		
Equipment hire		
General admin		
Advertising		
SIG Coordinator's expenses		
Insurance		
Printing/programme/advert/leaflets		
<b>TOTAL EXPENDITURE EXPECTED</b>		
<b>PROFIT/LOSS EXPECTED</b>		
Percentage share of profit/loss between Sig Host organisation	50% 50%	

## (vi) A Sample Event Agreement: IATEFL Business English Special Interest Group (BESIG)

### THE ORGANISER AGREES

#### I: Financial Details

- 1.1. to prepare a draft budget based on 300 participants for approval by the BESIG Events Coordinator and IATEFL Executive Officer. No advertising of the event may be done until approval has been given.
- 1.2. to open a separate account for all BESIG transactions and to employ correct bookkeeping procedures acceptable to the BESIG Treasurer.
- 1.3. to keep details of all expenses incurred in connection with the conference; to ensure official receipts are obtained of all expenditures
- 1.4. to decide on a 'call off date' by which the viability of the event is reviewed. If there are insufficient registrations the event must be cancelled. Cancellation must be communicated in writing.
- 1.5. to keep in continuous contact through the BESIG Events Coordinator.
- 1.6. To invoice publishers immediately on receipt of their request for space and to supply IATEFL Head Office with details of sums due
- 1.7. to prepare the final accounts by 28 March 200x after the conference and send them to the BESIG Treasurer for forwarding to IATEFL.

**Please note:** all payments for the 200x conference will be in Euros

The organisers are entitled to 10% (ten percent) of the net proceeds. This sum will be paid to the organisers by IATEFL Head Office when the final accounting has been made and the sum involved clear. Normally the entire proceeds of the conference should be paid into the IATEFL/BESIG account and the account closed officially by 28.03.

**Please note:** Unless otherwise stated the BESIG Events Coordinator is the only liaison person in all matters concerning the conference. This is to avoid confusion.

#### 2: Venue Details

- 2.1. to provide the conference venue at : XXX which includes a large room for plenary sessions seating at least 250 people, various sized rooms for seminars (at least 8), suitable room/space for a large resources exhibition, space for registration desks, a lockable room for committee/speaker valuables and luggage, cloakroom facilities
- 2.2. to organise for the provision of appropriate technical equipment/facilities when required in all rooms at the venue. OHP, cassette/CD recorders, video recorders, power point beamers
- 2.3. to organise some free parking and easy access for the publishers for loading and unloading
- 2.4. to arrange for refreshments to be served in the breaks, free of charge to every registered participant
- 2.5. to have a 'cafeteria' selling coffee/tea/soft drinks and snacks which will be open throughout the conference if possible
- 2.6. to recruit/hire local helpers (technicians, cleaners, students) to monitor rooms
- 2.7. to provide accommodation details. Ideally, the local tourist bureau should offer reduced rates and organise bookings directly with delegates to save work for organiser

#### Additional Points:

The BESIG committee will require a room from 12 noon on the Thursday to before 1 p.m. on the Friday before the conference for their autumn committee meeting. Refreshments should be available as well as sandwiches and fruit for lunch - 50% vegetarian. They will also require a room on Sunday afternoon, from 16:30, for the BESIG AGM (Annual General Meeting). Hotel accommodation will also be required for 3-4 nights. There should be no charges to BESIG for the use of the meeting rooms required. The other costs incurred by the BESIG committee will be paid for by BESIG and are not part of the conference. The BESIG Committee Admin and Development person will liaise with the organiser on this.

#### 3: Paperwork Details /Advertising

3.1 to prepare an A4 flyer containing all registration forms and details. The required format and details to be included are on disk and as such require only minimal changes. A copy of any material intended for publication should be sent to the Events Coordinator for approval beforehand. This should be prepared in time for inclusion in the BESIG newsletter Business Issues (copy date 20 March) and for presentation and distribution at the IATEFL conference in spring. This flyer should be prepared so that it can be sent as an email attachment. A poster with basic details should also be prepared for the IATEFL event and for advertising on the spot. If the web site is being used for advertising etc the BESIG Web Coordinator should be consulted as to requirements.

**Please note:** all this can only be used if the budget has been approved by the required dates.

- 3.2 to compile the local information section of the programme (how to get there, hotel, station and airport locations etc.)
- 3.3 to compile details for websites: BESIG, ELTAs; IATEFL etc
- 3.4 to send out information on the ELTECS -List /ELTAs One-List /ETAS/Any other relevant lists
- 3.5 to send details for inclusion in the BESIG/IATEFL newsletters
- 3.6 to do all correspondence related to the event and keep a list of those contacted
- 3.7 to compile the bio data of speakers for future reference (add to existing disk)
- 3.8 to compile and edit the conference programme and the front cover with the approval of the BESIG committee. The BESIG logo should be used on all correspondence and advertising.
- 3.9 to compile the conference proceedings for inclusion in Business Issues (question of cost/profit).
- 3.10 to provide certificates of attendance/receipts/ as required
- 3.11 to provide details of accommodation arrangements

To help lighten the burden, full details of all paperwork have been put on disk - available as Word and .rtf files. In most cases only minimal changes will be necessary. The latest conference programme and bio data of speakers is also on disk and may help for the next event.

#### **4: General**

- 4.1 to attract local or regional sponsors for the conference venue, advertising in the programme. Sponsoring is essential in order to keep registrations fees as low as possible and to make a profit
- 4.2 to publicise the event locally
- 4.3 to review and decide on speaker proposals jointly with a member(s) of the BESIG committee
- 4.4 to contact publishers/institutions/industry requesting speakers if necessary
- 4.5 to contact publishers requesting contributions, e.g. buffet donation, folders, pens, bags, books for the raffle etc
- 4.6 to organise drinks and snacks on Friday evening and provide information on available events/restaurants for Saturday evening.

#### **5: BESIG agrees:**

- 5.1 to provide the organisers with a mailing list of potential participants and exhibitors (on disk) as well as all other information available (held by Events Coordinator)
- 5.2 to help choose speakers as well as keynote/plenary speakers
- 5.3 to publicise the event internationally
- 5.4 to contact publishers/institutions/industry if required
- 5.5 to be in constant contact with the organiser and help as required (Events Coordinator)
- 5.6 to organise the collection of cash payments at the registration desk (BESIG Treasurer)
- 5.7 to liaise between the organisers and IATEFL HO, website coordinator etc (Events coordinator)
- 5.8 to help out during the conference if required
- 5.9 to organise the 'meet the BESIG committee' slot and man a 'join up' desk
- 5.10 to organise that IATEFL Head Office collect registration fees/exhibitors' payments and advertising charges.

6. The parties agree that any alteration to this Agreement is subject to written notice.





7. This Agreement comes into effect when the authorised representatives have signed it and is automatically terminated after the accounts have been submitted and approved. These representatives are the BESIG Events Coordinator or BESIG Treasurer and the Overall Event Coordinator.

Signed (for BESIG) Organiser

Name: Name:

BESIG Events Coordinator Overall Event Coordinator

Date: Date: