



# Protocol for Hosting a Section Colloquium

## General

This Protocol should be considered as an agreement between:

- a. the Section Committee as the responsible body for organising Section colloquia (except in Congress years), and
- b. the host association(s) actually organising the colloquium.

An IAA Section can hold a colloquium in a specific location subject to the support of a host local member association. This requirement will not apply to venues where there is no local Full Member or Associate Member association.

Multiple Sections can jointly organize a colloquium, in which case the organisational and financial responsibilities should be clearly agreed between the Sections and the host.

The following are guidelines to help with the organisation of a colloquium. The responsibility for a successful colloquium rests with the host association's organising committee. Exchange of ideas with the Section Committee is encouraged as well as experimentation in view of continuously improving the format.

This Protocol is not meant to be rigid. In other words, adjustments are possible, but they should be discussed in advance with the Section Committee. It is suggested that a regular liaison be established between the host association's organizing committee and the Section Committee, i.e., through the local Section representative and the Section Secretary. The host should periodically update and consult with the Section Committee.

## Application

1. Application to hold a colloquium must be made in writing to the Section Committee normally three (3) years prior to the proposed date.
2. Final approval will be given by the Section Committee normally two (2) years prior to the colloquium.

## Financial Considerations

- The host association can support the colloquium in one of four ways:
  1. **FULL SPONSORSHIP:** the host association is fully responsible for the financial viability of the colloquium, and for any profit or loss that might ensue; the host association takes an active role in developing the Scientific/Professional Program.

2. JOINT SPONSORSHIP: the host association becomes an equal partner with the Section(s), including equal participation in the financial results (whether profit or loss) and active role in developing the Scientific/Professional Program.
  3. CO-SPONSORSHIP: the host association does not participate in the financial results of the colloquium or in the planning of the Scientific/Professional Program. The host association helps promote the event and the association's logo is included on the colloquium material along with other co-sponsors.
  4. NO SPONSORSHIP: the host association does not wish any form of participation, but has no objection to the colloquium being held.
- Sponsor contributions are encouraged, but the "commercial presence" should be restricted.
  - Colloquium fees are to be waived for the President of the IAA or her/his representative and the Section(s) Chairman(en). Registration fees for approved bursary recipients will be waived by the Colloquium organizer and invoiced at the lowest rate available (typically the academic rate) to the Section that approved them.
  - Airfare and accommodation expenses for the Chairman of the Section Committee may be included in the budget as reimbursable expenses.
  - Colloquium fees are to be waived for the Editor-in-Chief (EIC) of the ASTIN Bulletin attending an ASTIN and AFIR/ERM colloquium (either standalone or joint). If no other source of financing is available to the EIC, reasonable travel and accommodation expenses (according to the IAA's expense reimbursement policy) will be reimbursed by the Section, or in the case of a joint colloquium, proportionally by each Section according to the number of members in attendance. After reviewing the program and providing the scientific content merits the EIC's attendance, other Sections may also invite the EIC to attend their colloquia. The Section(s) must advise the host of the EIC's attendance for fee waiver. As above, the colloquium fee waiver and reimbursement of travel and accommodation expenses would apply.
  - The organising committee must advise the Section Committee of the proposed colloquium attendance fee and of a reduced policy for academics, companions and others prior to finalising the fee. In order to provide an incentive to join the Section, the registration fee for non-Section members should be higher by at least twice the cost of Section membership. The colloquium registration form should facilitate joining the Section by providing a link to the IAA Section Membership Form available on the IAA Website ([https://www.actuaries.org/Sections/Section\\_Membership\\_EN.cfm](https://www.actuaries.org/Sections/Section_Membership_EN.cfm)).
  - The IAA regularly contracts its events through a hotel broker. If assistance is required in locating a hotel for the event, the host association or Section Committee should contact the IAA Meeting Manager prior to negotiating the hotel contract. The IAA receives reward points through hotel bookings with the Marriot chain of hotels for which points can be utilized for future complimentary room bookings and upgrades.
  - Committee, should contact the IAA Meeting Manager prior to negotiating the hotel contract.
  - The host association or Section must submit a budget and ensure that the event is covered by insurance appropriate to the event and to the jurisdiction in which it is being held, including event cancellation insurance.
  - The IAA Secretariat can provide e-commerce services to collect registration fees, subject to a reasonable fee to offset administrative and transaction costs.

- An agreement outlining the duties and responsibilities of each party may be signed by the host association(s) and the Section(s) involved. In the event that an agreement is not signed, a checklist outlining the duties and responsibilities of each party will be prepared.

## Marketing

- The first announcement should be made as soon as possible after the venue and dates have been determined.
- A website will be set up through the IAA Secretariat.
- The IAA Newsletter and Section communications, i.e. the ASTIN Bulletin, as well as the Section members' list, are available for advertising the colloquium. All communications must be prepared by the organizers and provided to the IAA Secretariat for distribution.
- All official colloquium documentation and promotional material (i.e., badges, programs, banners, colloquium transactions, etc.) must include the logo of the Section(s), available through the IAA Secretariat.
- Colloquium organisers can encourage employers to support employee attendance by sending a letter to employers of actuaries emphasising the commercial benefits of attending the colloquium.
- Colloquium organisers should consider whether continuing professional development (CPD) credits can be awarded by actuarial bodies for attendance at the colloquium and advertise accordingly. An attendance document should be made available to all participants requiring one for CPD purposes.

## Scientific Committee and Meeting Format

- A Scientific Committee is nominated to review submitted papers and accept or reject them.
- The first call for papers should be made in conjunction with, or soon after, the first colloquium announcement.
- As part of acceptance of a paper for presentation at a colloquium, authors grant permission to the IAA or to the Section for subsequent non-exclusive use of the paper or presentation materials on its website or in printed or electronic proceedings of the colloquium.
- Papers should be available in advance in some form, preferably on the colloquium website without password protection.
- The Section Committee should inform the host organization of the preferred program for its colloquium, including such details as the need for a General Meeting, Section Committee meeting, prize ceremony, etc. and details with respect to speakers, language, length of sessions, etc.
- The Section Committee, in conjunction with the host organization, should consider whether any sessions need to be recorded and ensure that these expenses are included in the budget.

## Social Events and Hotels

The Section Committee will advise of the need for:

- A formal dinner for attendees
- An informal dinner for members of the Section Committee, members of the host organizing and scientific committees, and any special guests as a "thank you" event.
- Excursion(s) for attendees and accompanying persons.
- An accompanying persons' program.
- Pre and post colloquium tours.

Alternate medium and low priced accommodation should be offered (not necessarily as separate rooms blocks).

## Post Colloquium

The organizing committee should:

- Prepare a comprehensive post colloquium report for the Section Committee on the organisation of the colloquium in order to facilitate the organisation of future colloquia.
- Submit complete financial statements to the Section Committee with a copy to the IAA Secretariat.
- Provide the IAA Secretariat with the names, contact numbers and post and email addresses of all attendees to help market future colloquia, subject to data privacy protections.
- Provide the IAA Secretariat with statistics on the colloquium such as: number of delegates and accompanying persons in attendance, number of persons attending the various events, number of bedrooms sold per night, per hotel (provide name(s) of hotel(s) used).
- Prepare an article which will be published in the Section communication and the IAA Newsletter; this will help market the next colloquium.
- Provide all presentations for inclusion on the colloquium website.
- Prepare a brief report on the colloquium that describes the scientific proceeding for possible publication in the *ASTIN Bulletin - the Journal of the IAA*. This should be submitted to the Editor-In-Chief as soon as possible after the colloquium to ensure timely publication.

A toolkit for organizers is available [online](#).