



CONFERENCE APPLICATION INTAKE FORM

ISA GROUP CONFERENCES

INITIATING AN ISA CONFERENCE

This form needs to be submitted before the MOA (Memo of Agreement) process can begin (nothing can be contracted, reviewed or built and the MOA cannot be started until this is returned). **Do not initiate communications with vendors or venues until you've completed this process.** Have questions or unsure of what things mean? Set up a meeting with the ISA group conferences team and we can work to help fill this out together.

A minimum of 8 months ARE REQUIRED for initiating the conference intake process. **All dates are subject to HQ review and approval.**

*An ISA conference **CANNOT** be initiated until ISA-HQ has received completed Intake and Initial Setup forms. A conference cannot be contracted, built, advertised, launched, etc. until a signed MOA (Memorandum of Agreement) has been completed, to ensure that all parties are in agreement and ISA-HQ has the necessary information and resources available to support the conference.*

CONFERENCE INITIATION PROCESS & CONTRACTS & AGREEMENTS

The process for holding a conference begins with an Intake form with ISA HQ, and then a MOA (Memorandum of Agreement). This process takes some time, so make sure to start it ASAP! (We can't advertise or launch anything until this is done.)

ISA IS THE ONLY AUTHORITY IN VETTING AND SIGNING ANY CONTRACTS You must arrange all your hotels/venues through ISA HQ.

POLICIES TO KEEP IN MIND

- **All contracts and MOAs** (Memorandums of Agreement - hotel, other venue, suppliers) must be vetted & signed by ISA HQ.
- All ISA group conferences must adhere to ISA policies, including non-discriminatory provisions and public access.
- Region conferences need both ISA member/non-member registration rates (where member rate is at least \$25 lower than non-member rate).
- ISA Groups cannot have separate bank accounts. All financial arrangements must be made through ISA HQ.
- Recipients of Conference Funds (Travel grants, professional development, keynotes, etc.) **MUST** be current ISA members, provide receipts, and submit reimbursement forms. ISA is unable to issue reimbursements for non-ISA members.
- 4% Admin fee on registration payments by ISA members, 10% Administrative fee on payments by non-ISA members.
- ISA HQ negotiates and purchases an umbrella insurance policy to cover liability at conferences. Cost: approx. \$400.

SETTING THE CONFERENCE TIMELINE

In setting conference organization dates, we've found that it's best to work backwards.

- The **online registration closing date** depends largely on how long it will take you to craft the printed program and get your printers to print it, then add 3 days for HQ to get all your onsite materials together. (Typically, 3 weeks prior to the conference.)
- The **preregistration deadline** should be far enough in advance of the conference that there is some time to rearrange the program following the vacancies but no sooner than 3 weeks after the release of the program. This is also designed to give you the greatest degree of certainty about who will be participating in your conference.
- The **program announcement (schedule of panels)** should be at least 2 months in advance of the conference, if not sooner. Depending on your own work schedule and the number of proposals, the program can be built anywhere between 3 days and 4 weeks. Most program chairs/teams prefer to schedule 3-4 weeks to manage this.
- The **submission deadline** is the last day (through midnight) that you'd like to accept proposals.
- The **conference announcement** cannot take place until there is a signed MOA. This day should also coincide with the opening of your submissions. This should be at least 3 weeks prior to the submission deadline, with 6+ weeks being preferable.

(ISA-HQ to enter)

Requested by: _____ On behalf of (ISA Group): _____ Date Requested: _____

ISA CONFERENCE APPLICATION INTAKE FORM

PRELIMINARY INFORMATION

What is the ISA sponsoring group for this? _____

What is the conference title? _____

(example "ISA-West Pasadena 2018 Annual Conference" or "ISA-SSS / IS 2019 Joint Annual Conference, Denver)

What is your expected/estimated attendance? _____

First Choice Dates Preference Start Date: _____ End Date: _____

Second Choice Dates Preference Start Date: _____ End Date: _____

City/Country: _____ Conference Venue: _____

CONFERENCE CONTACTS

- Define the Primary Contact person - who will represent your group when coordinating with ISA-HQ and MUST be an ISA Group Conference Organizer. (As the designated representative, the primary contact person behaves as decision-maker for the conference arrangements.)
- List dates of potential travel during the months leading up to the conference when the Primary will be unreachable and who is authorized to make decisions in the interim.
- We recommend that all conference organizers have at least one additional team member identified to help with conference organization.

Name	Email	Organization/ISA Group	Role/Responsibility <i>(An ISA Group Conference Organizer needs to act as our Primary Contact – please specify)</i>	Travel Dates <i>(when main contact is unreachable -include name of coverage)</i>
			Region/Section/Caucus President - Has to approve final balance form and funds distribution prior to conference reimbursements	
			Program Chair - Crafts the panels and schedules them, fills program holes, coordinates with participants, etc	
			Partner Contact – (University/Venue point of contact)	

PARTNERING

Are you co-hosting this conference with another organization(s)? No Yes Org Name(s): _____

How will conference profit (if any) be distributed? _____

How will conference deficit (if any) be distributed? _____

Explain in detail how your conference will split associated costs, profit, deficit, etc.:

Who are the authorized signatories for your partner groups and/or host?

Individual's Name	Organization / University / Department Name	Email address

ISA INTAKE FORM CONTINUED – FURTHER CONFERENCE DETAILS

IMPORTANT!!! Do not initiate communications with vendors or venues until you've completed this intake process with ISA HQ.

Tentative information in the form below is fine at this stage. Have questions or unsure of what things mean? Set up a meeting with the ISA group conferences team and we can work to help fill this out together.

WHAT KIND OF CONFERENCE WILL YOU BE HOSTING?

University Option

- (Hotel and University partnership)* Panels and primary activities take place at a sponsoring university location or a building on university property that can be obtained for low or no cost. Guestrooms are contracted with a local hotel.
- (University only)* All panels and activities take place at the university or local building. Guestrooms are provided using student dorm rooms or other university-owned sleeping facilities. Sometimes universities have agreements with local hotels where the university is the contracting agent, not ISA.

Hotel Option

- All panels, meals and activities take place at one central hotel. This is also where the guestrooms are located. Everything is under "one roof"

CONFERENCE SUPPORT

WHAT SUPPORT IS NEEDED FOR THE CONFERENCE?

The following are common costs/arrangements associated with conferences. Indicate all your anticipated needs and expectations of what/who will be covering the cost. (ISA HQ is happy to help facilitate any of the below, but all costs/fees associated must be covered by the conference and/or group(s) directly.)

Item	Conference will cover cost	Host/Venue will cover cost	Other (explain)	Not Applicable
Panel Rooms (Meeting Space)				
Internet				
Audio/Visual (Projectors, Audio)				
Catering (Meals or Events)				
Security				
Transportation				
Exhibit Space/Tables				
Other:				
Other:				

ISA HQ SUPPORT - AUTOMATIC

All ISA group conferences will be provided with the following:

- ALL Contracting
- Proposal Submissions (through ISAnet.org)
- Registration Fees (through ISAnet.org)
- Program Files - Panel Schedule and Indexes (to be organized, supplemented & printed by organizer)
- Name Badge Printing Files (to be printed by organizer)
- Standard ISA Group Conference Website
- Conference email address (@isanet.org)
- Event conference insurance (at cost of \$400)

ISA INTAKE FORM CONTINUED – FURTHER CONFERENCE DETAILS

ISA HQ SUPPORT - AVAILABLE

Additional support from ISA HQ is available upon request, when possible. Indicate below all your anticipated needs. (ISA HQ is happy to help facilitate any of the below, but all costs/fees associated must be covered by the conference and/or group(s) directly.)

<input type="checkbox"/>	Guest Hotel Room (discounts)	<input type="checkbox"/>	Sponsorship
<input type="checkbox"/>	Hotel Meeting Space	<input type="checkbox"/>	Exhibit Space/Tables
<input type="checkbox"/>	Audio/Visual (projectors, audio)	<input type="checkbox"/>	Online Paper Archive
<input type="checkbox"/>	Catering (meals or events)	<input type="checkbox"/>	Travel Grants/Stipends
<input type="checkbox"/>	Catering (coffee breaks)	<input type="checkbox"/>	Award Presentations
<input type="checkbox"/>	Transportation	<input type="checkbox"/>	Professional Development Cmte Funds (regions only, by application only)
<input type="checkbox"/>	Advertising - Print	<input type="checkbox"/>	Pay It Forward Workshop Program (regions only, by application only)
<input type="checkbox"/>	Advertising - Web	<input type="checkbox"/>	Other?: _____

SCHEDULING

In a few sentences please describe what is happening (or what you want to be happening) at your conference. (For example, will it contain lunches/dinners, receptions, off-site events, business meetings, panels/roundtables, cultural events, etc.):

Outline, by Day, what you expect your conference to look like (please include start/end times for each event):

	Day 1:	Day 2:	Day 3:	Day 4:
Registration/Check-In?				
Panels?				
Luncheon?				
Evening Reception?				
Other? (explain)				
Other? (explain)				
Other? (explain)				

REQUESTED PRELIMINARY TIMELINE

Please take a moment to set tentative dates for the following:

1	Conference Announcement Date (<i>proposal submissions open</i>)	
2	Submission Deadline	
3	Program Announcement Date	
4	Pre-Registration Deadline (<i>date people must register by to remain on the program</i>)	
5	Online Registration Closing (<i>Onsite Conference Materials sent 3 business days after</i>)	

Please note, these dates are only tentative (not guaranteed) and no action can take place until MOA is signed.

ADDITIONAL DETAILS

Anticipated Registration Rates: ISA System staff will work with you to determine registration rates once the MOA is completed.

Is there anything else you'd like us to know about your conference?

Are there any considerations (i.e. university rules, local legislation, access issues, etc.) we should know about your city/venue?
