Planning and Organizing a TA Conference

A Manual

International Transactional Analysis Association
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INTRODUCTION

September 1995

You may have noticed that every conference has its own idiosyncratic character. Depending on a myriad of factors and choices, beginning with the geographical site and conference theme, the language and finances, to the mix of participants and the preferences and personalities of those who are the organizers.. .all play into the final event.

And because of the diversity within the worldwide TA community, no conference planners organize in quite the same way. Nevertheless, while the ingredients vary, the basic steps in the production of a conference follow in a logical order.

So this manual is offered both in the format of a time line because that is the way that things most often occur and because the authors, scattered geographically, seemed to think similarly in their individual efforts. The necessary ingredients are arranged by the numerical tabs.

These guidelines are intended as a resource, a mini-encyclopedia for use by those who seek explicit information as to how others in the TA community have done it before. A majority of these pages are thus comprised of what were considered excellent examples of "how to." They are ideas that have worked and not to be considered the "only way." Tailor them to your particular needs and style. Your own creativity in combination with the feedback of office staff and previous organizers will add to the future mix of what can eventually become a well-planned and successful conference, with an identity of its own.

Marilyn Marx
Susan Sevilla
Jonathon
Wagner Gaylon
Palmer

As with an orchestration, each individual voice on the conference committee adds to the overall affect of harmony, intensity and mood. Each voice adds depth, and each action adds to the overall success. No one voice is more important than the next. All are needed. Each one complements each other.

People putting together the program depend on presenters submitting their materials and the person talking to the venue depends on attendees signing up for hotel rooms. It is all intertwined. If you want an experience of extreme interdependence, put on a conference. There is no place for a prima donna. Even a solo has musicians playing their instruments in the background. It is a balance of creating an interesting and stimulating program, and taking into account several different points of view. The attendees benefit from a diverse bill of fare, while the program committee has the challenge of providing focus.

Many decisions must be made. Often a really good idea would break the budget, or a truly simple idea demands a search for many volunteers. As you work your way through the process of putting on your conference, you'll make these decisions and move on. The song continues, with no time to lick your wounds or make sure everyone else on the committee thoroughly understands your point of view. This balance between moving on, staying, and advocating for a concept, is ever present in most conference committee meetings.

So, ten years after our initial manual was made available to future ITAA conference conveners, here is the updated 2005 edition. We've streamlined the chapters to help you address each issue separately, and make the material fit your situation. The addendum gives you samples of letters and a summary of the 1995 conference form start to finish.

Many things have changed in the past 10 years. ITAA has become known for it's international settings of its conferences. The internet in now a major influence on whether someone decides to attend. Registration can be accomplished very quickly. Making a room registration is also easier. Some conferences have hired an organizer, and have had more time to develop other aspects of their conferences. Continuing education units are now a huge draw for attendees, and require careful handling and coordination with the accrediting agencies.

Gaylon
Palmer
Claude
Steiner

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Year	Business Meeting	Attendance	Annual Conference	Attendance
1986	Orlando, Florida Court of Flags	166	San Francisco, California Cathedral Hills Hotel	450
1987	Singapore Westin Hotel	278	Chicago, Illinois Westin Hotel	351
1988	San Diego, California Bahia Hotel	177	Rio de Janeiro, Brazil Hotel Nacional	549
1989	Honolulu, Hawaii Hawaiian Regent	203	Oakland, California Hyatt Hotel	326
1990	Oaxtepec, Mexico Oaxtepec Resort	386	Brusssels, Belgium Sheraton Hotel	600
1991	Mississauga, Canada Ramada	172	Stamford, CT Sheraton Hotel	300
1992	Brighton, UK Hotel Metropole	200	Auckland, New Zealand* Waipuna Hotel	225
1993	Cochin, India	300	Minneapolis, MN	335
1994	Nurnburg, Germany	700	Aruba, Du. Caribbean Aruba Caribbean	250
1995	Singapore Pan Pacific Hotel	240	San Francisco, CA Nikko Hotel	525
1996	Amsterdam, Netherlands	100	Calgary, Canada Sheraton Hotel	300
1997	Coimbatore, India Hotel Surya International	420	Caracas, Venezuela Hotel Tamanaco Intercon.	400
1998	Philadelphia, Pennsylvania	100	Zurich, Switzerland (Co-sponsor EATA)	800
1999	Maui, Hawaii	250	San Francisco, CA	525
2000	BUSSINESS MEETINGS DISCONTINUED		Halifax, Nova Scotia Canada	216
01	Sydney Australia	120	' 02 Utrecht, Netherlands	320
03	Oaxaca, Mexico	342	'04 Bangalore, India	252
05	Edinburgh, Scotland			

Chapter 1: Conference Host Committee

The key to a good conference is a well organized fully staffed Host Committee. If a group of you has decided that you would like to see an ITAA conference take place in your country or town this will be the core of the Host Committee; assemble a local planning committee and begin to meet to discuss the conference. Talk to President of ITAA or make a proposal a Board of Trustees (BOT) about your readiness to host a conference.

Eventually you will have to make a proposal (see Chapter 9) the proposal should include the names of the Host Committee and if possible who will be in charge of what function. There should be one Chair, one Treasurer and several Sub-Committee Chairs; Venue, Program, Social Program, Publicity, Volunteer Coordinator, Internet and Logistics.

Duties: It is best if every one of these functions is taken up by a different person; although, several functions can be assigned to one person if necessary.

Conference Chair: The Chair will need executive skills, a good knowledge of the organization and of those members chosen to work together. A sense of humor is a considerable asset as is a "cool" approach to problem solving. The Chair oversees, and is ultimately responsible for the choice and scheduling of all events and for the publication of the program booklet, BOT meetings, pre-conference institutes, opening and closing events, plenary panels, conference presentations and workshops, banquet, dance, support groups, pre-and post conference tours which have to be planned and coordinated, CEU's have to be administered and it's the Chair's job to make sure that this done correctly.

Treasurer: This person makes up a budget, (see chapter 5) and opens up a conference checking account, keep track of expenses, pay bills and collects income from conference registrations. The treasurers may work closely with another person who acts as registrar. The Treasurer writes a final profit/loss report dispenses funds and closes the conference checking account. The profit/loss split is determined by the written contract between the ITAA and sponsors.

The Venue Chair: is the liaison between the Host Committee and the Venue's representatives, and is responsible to oversee accommodation arrangements, make sure that sufficient meeting rooms of appropriate size are available, and arrange for refreshments during breaks and arrangements for the banquet. This job is key; the contract with the venue will include such diverse parts as how much coffee for breaks, and how many rooms for large and small group presentations.

The Scientific Program Chair: is responsible for the choice of presenters, writing a call for proposals, seeking out current topics to make the program timely, evaluating proposals and choosing presenters, sending out acceptance letters and contracts, scheduling presentations, and choosing appropriate rooms for each presentation.

The Social Program Chair: is responsible for the planning and organization of all social events; the opening ceremony and party, award ceremonies, banquet, dance, closing ceremony and any other social events as well as choosing of moderators and music groups. The Social PC makes sure that conference workers and volunteers are properly publicly thanked and makes sure that there is at least one picture of Eric Berne prominently displayed at the proceedings. The Connector area,

Hospitality Room, banquets and buffets, dances, a children's or youth program, optional tours and entertainments, support groups, men's and women's caucuses, Message Board, are typical offerings in the social program.

The Publicity Chair: is responsible for the public relations of the conference and oversees public service announcements, should be prepared to send to local radio, TV and newspapers. If posters have been developed, develop a list of organization or groups for distribution. Develop ads for publication, to be published 9, 6, 3 months and 4 and 2 weeks ahead of the conference. Coordinate with editors of *Script* and *TAJ* for the placement of announcements. Coordinate with ITAA Webmaster to publicize conference, (see Chapter 5) Arrange interviews on local TV and radio stations for the keynote speakers or local ITAA members.

The Internet Chair: The Internet Chair arranges for the establishment of a conference web page; hires a web master and coordinates the contents of the web page with the different Chairs so as to include on line registration, room reservation, on line call for papers and the publication of events and presentations as they are secured. The Internet Chair surfs the web page and updates it regularly publishes the pertinent e-mail addresses of the several Chair so that questions can be addressed and answered on line. The ITAA keeps a record of several conferences' web pages as well as this manual to be used as references, under www.itaa-net,org/conferences.htm

Apparatus/Logistics Chair: This is a job for a person who has a fine eye for detail. Setting up registration the day of the conference takes a team of six people, while two are at the front desk; four are available to run errands, find audio visual equipment, run interference on problems that arise. Sometimes, the people at the front desk meet newcomers from out of the country who are dazed and disoriented and need anchoring. Often this group is faced with handling several problems at one time.

Volunteer Coordinator: Involves as many volunteers as possible. Look for volunteers to help man the registration table, introduce speakers, be on hand at the connector room, greet new comers, decorate for the banquet, and help maintain order at social events (such as the banquet). Often volunteers are given a break on their registration fee because they offer their time and efforts. The volunteer coordinator should locate 12-15 people to help out.

Some Thoughts about Morale:
Running a conference can be a daunting task. There will be anxiety about the success in attracting attendees and raising sufficient funds. There will be conflicts about who shall present and what. As the conference proceeds there will be complaints and far les compliments; that is normal and must be endured with good cheer. Good morale is a quality of ITAA conferences because of the general attitude about strokes and friendly OK/OK relations. One of the Chair's jobs is to maintain good morale but being positive, resolving conflicts and giving constructive criticism as well as strokes.

HOST COMMITTEE CONFERENCE PROPOSAL OUTLINE

1. Please tell us what your Vision for this conference is; why it should happen in your town/country, what its theme would be and why your group is capable of organizing it successfully.

2. Proposed Conference Dates: _____

3. Proposed Conference Chairperson. Qualifications

4. Who would be Conference Committee Members and what functions would they perform? Qualifications

5. What are your proposed housing plans (including low cost) and venues? Brief descriptions?

6. Who would be your attendees?

7. What is your Marketing-Promotion Plan?

8. What is your Transportation Plan to city and to venue? Air travel to and from major cities? Train and bus lines? Other transportation?

9. Conference Budget (Proposed Income/Expense Balance Sheet)
   □ Hotel space and reservation costs, deposits, etc.:
   □ Advertising estimates:
   □ Committee expenses:
   □ Program production expenses:
   □ Proposed conference fee structure:
   □ Estimated # of registrants to recoup expenses:
   □ Requested "seed money" from ITAA and other host organizations.

10. Time Lines (Example: For deposits for hotel, meeting rooms. Your deadline for go ahead)

11. Phone, Mailing Addresses, E-mail: _____

Chapter 2: Host Committee Timelines 4 Years Out

Submit Tentative Proposal:
Talk to President of ITAA or make a proposal at a Board of Trustees (BOT) meeting about a possible conference in your town or country.

Feasibility Study:
How many local volunteers are available to do the work required to put on a conference (At least 10 people)? How many local participants might attend? How many international delegates might realistically be expected to attend? What impact would the local economy and interest in TA have on the ability to put on a profitable conference? Make a tentative budget.

Proposal Studied:
If ITAA President or the BOT favors the idea, it would be forwarded to the ITAA Conference Committee and the BOT for exploration and for a recommendation back to the Board at their next meeting.

Await feedback from the BOT on the desirability of such a conference. If the Board is in favor of the concept, begin planning.

3 Years Out

Conference Proposal-Approved by ITAA:
At this point, an indication of approval is to be expected from the ITAA Board. Pick the dates of the conference.

Form a Host Committee: (see Chapter 1)

Venue:
Exploring possibilities for and booking the conference facilities involves site visits by a number of chairpersons to view the rooms, accommodations for meetings and social events, parking facilities, catering and equipment. Explore at least two other venues before actually booking. Ensure that there are other hotels nearby with additional accommodations available if there is an overflow. Investigate and secure low-cost accommodations. Note transportation availability between conference site and outlying hotels.

Delegation of Duties:
Choose people you know to be reliable, efficient and knowledgeable to co-chair and staff your conference. Clearly delineate their various tasks, preferably in writing.

Negotiate ITAA Contract:
The chair of the local host committee should negotiate a contract for the conference with the ITAA as early as possible.

Program Development:
Develop a theme.

Develop a logo.

Identify possible opening and closing keynote speakers to be invited. Determine honorariums for keynote speakers, if any.

Plan publicity

Budget:

Draft a preliminary budget. (See Chapter 4)

2 Years Out

Venue:

Select, negotiate with and obtain a signed contract from the hotel. Decide whether or not to obtain insurance should conference be cancelled by hotel or natural disaster. Make a clear agreement about how many rooms will be booked, and how many delegates will have to book accommodations as part of the hotel contract.

Request the equipment you require at the time of booking the conference facility including, lecterns, microphones, flip charts, blackboards, video monitors, overhead projectors; slide and Power Point projectors as well as secretarial, computer, Internet and copying availability. If the hotel does not provide them or is too costly, request bids from outside providers who can deliver the equipment.

Budget:

Firm up the budget. (See Chapter 4)

Program Development:

The Program committee issues a call for proposals, decides on a basic outline for the schedule and program and contacts individual members to encourage them to submit program proposals to fill out the program.

Confirm keynote speakers. The keynoter sets the tone for the conference theme. Keynoters, institute presenters and plenary panelists need to be invited well in advance, initially by e-mail or by phone to be followed up by letter. Get written confirmation of acceptance and terms

Communication:

Maintain regular communication with the ITAA President and Board, the ITAA office, and the Conference Committee.

Publicity:

Develop a master plan for publicity. Coordinate with Robin Fryer for types of materials needed. Make graphics for ITAA web page and submit to web master.

Scientific Program:

All presenters are being confirmed in writing and scheduled. Contracts are sent to the presenters, indicating conference registration is required and indicating cancellation policy including deadlines. A list of presenters who might be willing to substitute in case of cancellation can be useful. Develop program booklet to be mailed by 6 months before the conference. Include as many names of presenters as possible. Have CEU (Continuing Education Units) in place by 9 months previous to date of conference.

Social Program:

The cheer and goodwill generated by this aspect of the conference is vital to its success. Characteristic of TA conferences is the location of a central place for the relaxed exchange of ideas, meeting and greeting old friends and meeting new people. The Connector area, banquets and buffets, dances, a children's or youth program, optional tours and entertainments, support groups, men's and women's caucuses, etc. are typical offerings in the social planning. A banquet followed by a dance with live music is a strong tradition at ITAA conferences. There are wide variations possible according to your locale and the preferences of the committee. Make all arrangements now, solicit local talent and obtain signed contracts.

Publicity:

All publicity should now be in place. Public service announcements should be prepared to send to local radio, TV and newspapers. If posters have been developed, develop a list of organization or groups for distribution. Coordinate with ITAA editors *(Script* and *TAJ)* and webmaster to publicize conference. Develop 3-4 ads for publication, to be published 9, 6, 3 months and 4 and 2 weeks ahead of the conference. Arrange interviews on local TV and radio stations for the keynote speakers or local ITAA members.

Venue:

Maintain frequent contact with venue representative. Review all aspects of the agreement.

Registration:

Develop system for keeping track of all registrations.
Send confirming post card, email, or letter to registrants and presenters.

Work closely with CEU person to unsure coverage of registration desk.

Social Program:

Make all arrangements now, solicit local talent and obtain signed contracts. Especially important is the selection of the live music for the banquet. Make sure that the will provide music for "jumping up and down" (Eric Berne's description of a good party) for dancers of varied ages and backgrounds. (Latin rhythms a must.)

Volunteers:

Continue to recruit local volunteers to help in the conference. Volunteers should be meeting regularly.

Budget:

Monitor budget monthly. Revise projections as appropriate. Report to the ITAA Board twice per year and consider alternate ways to increase revenue at conference (e.g., exhibits, audiotapes,

proceedings, booklets, advertising, photo sales, and other outside events).

6-9 Months Out

6-9 Months Out

Review travel bookings for special speakers.
Review audiovisual needs and obtain bids from suppliers.
Obtain ITAA Board and Committee meeting requirements from BOT Secretary and make arrangements with the venue.
Update all publicity make contacts with local media.
Review and refine budget.
Plan for recognition ceremonies and order awards, if appropriate

3-6 Months Out
Select menu for banquet
Order printed materials: portfolios or notebooks, nametags, ribbons, etc. Confirm special events.
Prepare signs.

6 Weeks Out
Finalize food and beverage requirement.
Finalize ITAA Board meeting requirements.
Plan schedule for the connector room.
Prepare and distribute press packets, and hold press conferences. Arrange for people to introduce keynote speakers.
Print evaluation forms and make plan for distribution and collection.

4 Weeks Out
Visit venue and go over final plans
Review program, and have final program printed.
Prepare registration packets.
Prepare roster of attendees and all handouts.
Final foreign language interpretation arrangements confirmed.
For general sessions, confirm speaking order and length of presentation (Important!) with all speakers.
Assign a reporter to write for *The Script,* and a photographer to take pictures for publication.
Do final mailings and local publicity with schools and institutions.

Day Before the Conference
Set up at the conference site.
Walk through the program at the meeting site.
Review all set-ups, including the registration area.
Review the rooming list with the hotel.
Hold a pre-conference meeting with hotel personnel, volunteers and Host Committee as well as with the ITAA staff, if present.
Meet with volunteers for last minute briefing and pep talk

Establish Communications Central. Answer calls from press, out of town visitors late registrants etc. Make sure the venue switchboard and Front Desk is aware of conference and knows how to refer inquiries to the Communications center. Set up two large message boards: one message Board for delegates (with message slips and writing materials) and another for program announcements.

Day of the Conference
Communications Center: Host Chair or representative and volunteers must be available throughout the Conference to field questions complaints and suggestions.

Have daily debriefing meetings with Host committee members and volunteers.

There will be many complaints that normal. It is important to keep up morale, respond politely to all complaints and suggestions and to try to find solutions to problems. Its OK to solicit strokes from attendees and each other. You are doing a great job and deserve much praise! Give strokes and discuss what is working, what is problematic and how to solve problems that arise.

Post Conferences
Evaluation:
This is how you will know whether and how well you accomplished what you started out to do. Participants can assess their work as well. Forms for evaluations are essential to getting the feedback in a format that can be useful for future planners and presenters. Final figures and numbers from the conference, press clippings, and post conference reports from committee chairs are also essential feedback data.

Basking in the Glow:
Work Accomplished! And now it's cleanup time. This is a fun time to relax and bask in the glow of you accomplishments. Have a little party give each other strokes and tell stories Plan to work together again soon. Isn't Transactional Analysis just wonderful?

Hold post-conference meetings/communications to report and exchange information, Opinions, pros and cons and other data are most effective the closer they are in time with the end of the conference. Letters of appreciation should go out as soon as your data is in and assimilated and you've gotten your health back.

Write and Review and Finalize:
Write thank-you notes to all presenters and finalize final registration list.
Coordinate disbursements with the ITAA financial officer.
Review evaluations.
Write report to BOT through Conference Committee chair with suggestions for future conferences.
Encourage papers for *TAJ and the Script* arising from particularly well-done presentations.
Finalize all tapes, books, DVD and CD sales.
Contact the VP of Operations to update this Manual

Chapter 3: Venue

Three factors determine the choice of venue: location, availability and atmosphere. Our conferences are known for having a place in the venue to socialize and meet people. The "connector room" gives attendees a chance to be more informal with each other, to make plans and to forge friendships. In your planning appraisal of the venue, you will be looking for such a place. The location of the conference is often a discussion that takes place years before the actual conference. The ITAA conferences have been all around the world, and each site has its unique experience attached to it. In San Francisco, it's the cable cars and in India, it's the motorized rickshaws.

Ideally the conference is close enough to a metropolitan area which offers attendees from out of town an opportunity to travel as well as attend the conference. Many cities such as Sydney offered so many tourist attractions that attendees were content to explore the city.

So, you've found the perfect place which has the "just right" atmosphere, and then is it available? Often good sites plan their own events two or more years in advance, so timelines is of the utmost importance. Once you've located a venue, even if it's a possibility, contact the management to find out their calendar of events. You'll want to estimate the number of rooms needed for the program and the number of sleeping rooms needed. This is an estimate only, and will be more detailed at the time a contract is signed.

Because ITAA conferences are planned so far in advance, the planning committee will have a fairly good idea how many will be attending. In the recent world TA conference in Edinburgh, the university could only accommodate seven hundred sleeping rooms, so people were turned away at the last minute due to a shortage of rooms. Alternate sleeping rooms can be arranged at near by hotels or bed and breakfast hotels as well. As the conference date draws nearer, there will be a final signed contract with the venue, and adjustments can be made.

Be sure to take note of any special rules a venue may have. One San Francisco conference was held at the same time as a union strike, and even though the contract says only union workers could carry into the hotel our apparatuses for the conference, we had to make a difficult decision to cross the picket lines. Some venues prohibit food being brought in from the outside as an example of watching for these unique rules. Most of these conflicts are worked out satisfactorily for each side.

SAMPLE: OUTLINE OF YOUR FUNCTION ARRANGEMENTS

Date Time	Function	Set-Up	People
			See Rental Scale
Mon. 8/7 24 hour	Registration Desk (with Bookstore)		Flow
8am-5pm	Workshop (2)	Theater	30 each
Tues. 8/8 24 hour	Registration Desk (with bookstore)		Flow
8am-5pm	Workshop (2)	Theater	30 each
9am-5pm	Meeting (2)	Theater	50 "
9am-5pm	Meeting	Theater	40 "
9-10:30am	Meeting	School Room	50 "
10:30am-4:30pm	Meeting (6)	Informal Circle	5 "
' 4:30pm-6pm	Meeting	School Room	50 "
5pm-7pm	Meeting (2)	Theater	40 "
Wed. 8/9 24 hour	Registration Desk		Flow
8am-5pm	Meeting	Theater	50 each
8am-5pm	Meeting (3)	Informal Circle	10 "
8am-5pm	Workshop (2)	Theater	30 "
9am-5pm	Meeting (2)	Theater	50 "
9am-5pm	Meeting (3)	Theater	40-60 "
6pm-7pm	Open	Theater	350 "
8:30-10:30pm	Reception	Informal Circle	350 "
Thurs. 8/10 24 hour	Registration Desk	Flow	Flow
8am-9am	Groups(10)	Informal Circle	15-20 each
9am-10: 15am	Gen. Session	Theater	350 "
10:15-10:45am	Coffee Break	Flow	Flow
10:45-12:45pm	Workshops (10)	Theater	20-75 "
2:15-5:15pm	Workshops (10)	Theater	20-50 "
2:00-5:00pm	Exec. Comm.	Suite	10-12 "
6pm-7pm	Gen. Assembly	Theater	350 "
Fri. 8/11 24 hour	Registration Desk	Flow	Flow
8am-9am	Groups(10)	Informal Circle	15-20ea "
9am-10:15am	Gen. Session	Theater	350ea "
10:15-10:45am	Coffee Break	Flow	Flow
10:45-12:45pm	Workshops (10)	Theater	20-75ea "
2:15-5:15pm	Workshops (10)	Theater	20-75ea "
2:00-5:00pm	Exec. Committee	Suite	10-12ea "

OUTLINE Continued, p.2

Weekend Schedule			
Date Time	Function	Set-Up	People
			See Rental Scale
Sat. 8/12 24 hour	Registration Desk	Flow	Flow
8:30-9:30am	Groups(10)	Informal Circle	15-20 each
9:30-12:30pm	Workshops (10)	Theater	20-75 "
2pm-5pm	Workshops (10)	Theater	20-75 "
*Optional			
8pm-11pm	Banquet	Rounds	250 "
Sun. 8/13 24 hour			
9am-11am	Closing Panel	Theater	250"
Sun. 1Optional			
11am-1pm	Closing Brunch	Rounds	300 "
11pm-6pm	Board Meeting	U shape	40 "
Mon. 8/14			
1pm-6pm	TEW	Informal Circle	20 "
Tues. 8/15 8am-5pm	TEW Breakouts (2) Informal Circle		20 "

Function space has been reserved in accordance with this schedule. Therefore, please review the agenda carefully and indicate any changes or corrections where applicable. Meeting space attrition will apply for any slippage incurred that might cause the hotel to reassign meeting space should attendance decrease or increase to such an extent that the designated room would be inappropriate.

*Optional Banquet or brunch to be offered (one only) at extra charge to participants-thus lower estimate.

OUTLINE OF A TENTATIVE CONFERENCE SCHEDULE

1Tabletop Exhibits-The regular area will include approximately 12 (6') tables provided by the hotel at no charge.

Day	Planning	Room/Capacity	Catering
Monday			
8-12pm	Long Range	Arrival Day	
1-5pm	ITAA Proposal Mtg.	Arrival Day	
Tuesday			
8-5pm	Long Range	1 room (40)	Continental Breakfast
10-6pm	ITAA Conf. Mtgs.	5 rooms (10)	
8-5pm	Pre-Conf. Institutes	2 rooms (20)	Coffee
8-5pm	TA 101 (Part 1)	1 room (35)	Coffee
Wednesday			
8-5pm	BOC Exam Hdqrtrs.	1 room (40)	Coffee
9-5pm	BOC Examinations	6 rooms (10)	
9-5pm	Pre-Conf. Institutes	2/3 rooms (20)	Coffee
9-5pm	TA 101 (Part 2)	1 room (35)	Coffee
7-10pm	Conf. Opening Party	1 room (300)	Cocktails
Thursday			
8-9:30am	Keynote Address	1 room (300)	
9:30-10am	Coffee Break		
10-12pm	Workshop(s)	6-8 rooms (20-50)	
12-2pm	Lunch (No Host)		
2-5pm	Workshops	6-8 rooms (20-50)	
Evening	Social Event		
Friday.			
9-10am	Keynote Address	1 room (300)	Coffee
10-12pm	Workshops	6-8 rooms (20-50)	
12-2pm	Lunch (No Host)		
2-5pm	Workshops	6-8 rooms (20-50)	
Evening	Social Event		
Saturday			
9-10am	Keynote Address	1 room (300)	Coffee
10-12pm	Workshops	6-8 rooms (20-50)	
12-2pm	Lunch (No Host)		
2-5pm	Workshops	6-8 rooms (20-50)	
7-10pm	Optional Banquet	1 room (150)	Dinner
Monday-Wednesday (3 Days)			
8-5pm Post-Conf. Workshop (TEW)		2 rooms (20 ea)	Coffee

****ALSO NEEDED: 24-hour Registration Desk, Bookstore, Hospitality Room

Chapter 4: Select a Theme

One of the key ingredients to a successful conference is the selection of a viable theme around which the program will be constructed. The Keynote speaker will address this theme, and inspire and instruct the participants in the Opening event, and the daily keynote speeches.

We all have our favorites. In the initial discussion about the theme of the conference, keep in mind what may be your favorite may not fly with the other committee members. You don't want a watered down theme that will have a ho-hum response, so finding ways to put potency in the theme is the desired outcome. Writing the description of the theme must be inspired; otherwise people will not be attracted to learn more about what you are presenting. Most of the papers in the conference will be expected to address the theme in a significant way. If you decide to compile a written or electronic group of conference papers, the theme will tie all these presentations together.

When the theme is too restrictive, the conference becomes boring, because ideas are mentioned over and over again. When the theme is too broad, the public relations committee doesn't have much to work with. Keep in mind that the committee must invent a logo, or visual to associate with the theme. In the "New Wine from Old Roots" theme, the visual was a grape vine, showing the roots, representing the history and culture of transactional analysis. "Freedom and Responsibility" of the Edinburgh World TA Conference, showed two arrows, one white and one blue, intersecting each other.

Program Booklet

- Two versions are printed

- Preliminary booklet to be mailed to conference registrants six months out

- Final Booklet to be handed to attendees at registration

- Extra copies should be available at registration desk.

Basic Outline of Final Booklet

- Cover page

- Logo

- Dates

- Venue

- Welcome from President

- Welcome from Host Chair

One Page Overview: Summary of schedule of activities with times of the whole conference including pre and post conference activities

Daily Programs: Daily overview page. List of presentation times, titles, abstracts, pictures and biographies of presenters.

Alphabetical list: List of all presenters and pages where they appear in the booklet.

Venue Map: Map of the Venue with room names and numbers City Map: Map of the city,

conference hotels and transportation.

Ads

GUIDELINES FOR CONFERENCES WITH CHILDREN AND YOUTH PROGRAMS

April 25, 1990

TO: Julie Hay

FROM: Susan Sevilla

RE: Children's Programs at Conferences

I think the Board approval of the inclusion of the Children's Program at the Brussels conference should be considered a special approval, under special circumstances. I would recommend that the Board think again about the principle of <u>always</u> including a children's program at conferences.

ITAA conference experience has been that very dew parents bring their children to conferences. The ITAA offered a children's program in Oakland in 1983, in Toronto in 1985, and in Singapore in 1987. Each time, we had very little participation, very high expense, and lots of worries.

The factors and considerations to look at:
Are there enough children to make the program work?

Will the Children's Program actually draw parents to the conference that wouldn't otherwise come?

Can we afford the high cost of the rooms, supplies, materials, and teachers/caregivers?

Are we adequately covered by liability insurance in case of accident or???

Will there be an educational component (a TA component) so that the kids benefit from their own "mini-conference", or is this simply babysitting?

Alternatives to consider include:
A babysitting co-op of parents; A babysitting service contracted by the hotel with coverage by hotel liability insurance.

Translation/Interpretation

The primary language of all ITAA Conferences is English. It is ITAA policy to offer translation and interpretation at all International Conferences whenever feasible.

In general, this policy has been implemented as follows:

At ITAA Conferences, we usually offer interpretation into one primary language (other than English) at each conference. Exception: at the San Francisco Conference in 1995, we offered interpretation into Spanish and Japanese.

Volunteer interpreters are sought to provide the interpretation service.

A decision about incentives or rewards for interpreters is made at each conference, specific to that conference. Sleeping room expenses, conference registration, or very modest honoraria can be offered.

Always give ample recognition and strokes for the interpreters work are given in the program materials and in public ceremonies.

It is essential that all interpreters be familiar with TA. It is useful to provide them with an orientation meeting, and with a printed lexicon of familiar TA terms. Two techniques of interpretation: the whisper technique, and consecutive interpretation. With the whisper technique, all speakers of Spanish (for example) gather in the far corner of the room, while the interpreter whispers a simultaneous translation. The presenter must speak slowly, and pause when the interpreter indicates a need for a pause. With consecutive interpretation, the interpreter and speaker work together on stage, speaking alternatively, slowly, sentence by sentence.

- Usually general sessions must be interpreted by the consecutive technique.

- It is essential to let the speakers and workshop presenters know in advance that they will be interpreted, because interpretation is very time-consuming. It means that they must prepare about one-half the material that they would present for an all-English presentation. So it must be part of their contract in advance that we will provide interpretation.
- If at all possible, appoint interpreters to the workshops well in advance, and inform the presenters that they should send an outline of their speech to their interpreter in advance. It also helps to provide time for interpreters to meet their presenters in advance of the workshop.
- Translation of printed matter. Ample lead-time must be allowed to give the volunteer enough time to translate materials. Separate program booklets can be produced in different languages or one-program booklet is produced in two languages. All-English program booklets can be supplemented with summary programs in shortened form.

CONFERENCE PROPOSAL OUTLINE

Your name and titles Your email address

Your Address

Country   Daytime Tel/Fax   Evening Tel/Fax

The Presentation

Title_____

Abstract (maximum 100 words)

Description of Presentation:
Lecture, Panel or Workshop:

Theoretical/Experiential?

Length; 50 minutes 1 ^ Hours 3 hours

Clinical, Educational, Counseling, Consulting

TA Knowledge Required? None   Basic   Advanced
Maximum Participants?   the committee reserve the right to
set workshop maximums to fit space and the overall program.

Brief Biography (maximum 40 words)

TA Qualifications?

I cannot present on:

I will present this workshop with:

Co-presenter's Biography (Maximum 40 words)

CONTRACT TO PRESENT

Please sign below to acknowledge your contract.

If my proposal is accepted, I agree to attend the Conference and make the
presentation here proposed. I understand that to break these commitments will
disrupt the conference program, seriously inconvenience the committee and
disappoint the delegates. I understand that I am responsible for my conference
fees and all travel and attendance related expenses.

Signed

(Your proposal will not be considered unless you agree to the above terms)

Chapter 5: Budget

The budget includes projections on attendance. Strive for a profitable conference. ITAA will request 30-50% of the profit in exchange for the designed conference status. Include the amount of seed money requested from ITAA and co sponsoring group.

The budget is a theoretical document made real by the amounts of money needed to run the conference. How difficult it is to estimate the future, and yet a budget is supposed to do just that.

Look at three possible outcomes for income: attendance at a 100, 200, and 350. After a certain count, all your expenses are paid, and the bursar can rest a little easier.

Moderation and short cuts are the keys to your conference budget. You'll want to be able to finance the creativity of your committee members, while keeping an eye on the "dollars and cents" of the project. Both ideas are easily achieved, although you might not be the most popular member of the conference committee while these issues are being discussed.

By including the items on the list described on the next page, you'll see the items that need to be decided when formulating your initial budget. Make sure you include an estimate on each of these items, even if it doesn't make sense on first glance. These items are included to give you some leeway as the conference planning unfolds, and the actual budget amounts become clarified. It is the difference between the actual figures and the potential figures.

For example, it might be easier to buy a stamp of the conference logo, to make up your own envelopes, than to buy printed envelopes. Budgeting is an active process, not a passive one. Questions of "is this covered on the budget, should be uppermost in every discussion about a particular aspect of the conference. The bursar will always be a part of the discussion, keeping in mind the African saying," When you wrestle someone to the ground, you don't then bite him."

SAMPLE BUDGET PLANNER

Venue Selection Expenses: (Sites usually provide guest accommodations)

Transportation for committee members and a if needed, a meal _____
Phone Costs _____ Incidentals _____

Meeting Rooms: By shopping carefully you should be able to get free meeting rooms depending on guest occupancy. You will need to specify the number of room, capacity and hours needed including evenings. Remember to release unneeded rooms.

Number Of Room Capacity	Days Needed x Cost Per Day	Total Costs
25 People		
50 people		
100 people		
Banquet Hall		
Dance Floor		
Sound System		
Flip Charts		
Chalk Boards		

Hospitality Expenses:

Meal Functions:
Luncheon Costs _____ Gratuity_____ Tax _____ Total
Dinner Costs_____   Gratuity _____ Tax _____ Total

No-Host Bar Expenses: There is usually a cost for bar tenders- if a certain minimum of sales is not met. Check to see if a bar, set up with a meeting in between, counts as two set ups

Minimum Sales needed   Cost Otherwise

Coffee Breaks

Number of Coffee Breaks: _____ x (Cost _____) = _____

Publicity Expenses:
Logo Artwork cost _____
Printing cost _____ (varies as to paper, quantity and printer - shop around)

Program Booklet Expenses:
Type-setting Cost _____   Printing Costs __
Mail Lists Cost_____   Mail Labels Cost
Postage _____

Office Expenses:
Phone _____ Supplies _____ (stationary, envelopes, computers, disks, etc.)
Secretary_____ Computer Services _____ Postage_____

<u>No-Host Bar Expenses:</u>

There is usually a cost for bar tenders- if a certain minimum of sales is not met. Check to see if a bar, set up with a meeting in between, counts as two set ups

List Sample Of Costs: Snacks, etc.

Item/Cost _____ / _____
_____ /
_____ /
_____ / _____
_____ / _____

Minimum Sales needed   Cost Otherwise

Examples			
•Number of Coffee Breaks	Amount x Cost	= Total Cost	
•Number of Soft Drinks :	Amount x Cost	= Total Cost	
•Number of Donuts, etc:	Amount x Cost	= Total Cost	
•Number of Chips, etc:	Amount x Cost	= Total Cost	

Publicity Expenses:
Logo Artwork cost _____
Type setting cost _____
Printing cost _____ (varies as to paper, quantity and printer - shop around)

Program Book Expenses:
Type Setting Cost_____   Printing Costs __
Mail Lists Cost_____   Mail Labels Cost
Attach Labels   Postage _____

Office Expenses:
Phone _____
Supplies _____ (stationary, envelopes, computers, disks, etc)
S ecretary _____
Computer Services _____
Postage _____

Program:
Phone _____ Postage _____ Speakers _____

Conference Proceedings:
Type Setting Cost_____ Printing Costs _____ Binding

BUDGET OUTLINE

INCOME

Registration fees Guest packages Pre-Conf.
Institutes TA 101
Ads in program booklet
Sales (audio, synopses, t-shirts, etc)
Banquet (50% attend at $5 per person profit)

TOTAL_____

EXPENSES _____

Payroll - Staff (25%)
Payroll - Admin.(5%)
Payroll - Taxes Staff Benefits Advert. &
Promotion (1)
Equipment Rental (no video)
President Expense Secretarial Support
Insurance
Mailing Labels/Service Hotel Expense (2)
Honoraria (3)
Social Program
Contingency/Miscellaneous
Supplies
Postage
Printing/Copying (4)
Travel Fare Speakers Telephone/Fax
Translation/Interpretations (95)
Scholarships- Registration Fee Reduction

TOTAL_____

TOTAL INCOME

Chapter 6: Internet

A well ordered web page for your conference can be a great magnet for attendance.

One year before the conference you should place a link on the ITAA and other TA and professional organizations leading to the Conference's index page. The link should have the Conference logo with theme, date and location as well as a line indicating the availability of CEU's, this ad will be placed on a prominent place in the ITAA web site index page by the ITAA webmaster.

Your web site should have an index page with links to:

- Registration with details of costs and method(s) for paying registration fees
- Call for papers for delegates to make presentation proposals
- Venue for booking accommodations
- CEU's with details of who is eligible
- Your city's Chamber of Commerce web page
- Social programs and special programs: such as youth events.

Each one of these links and the home page should have a link called "Contact us" with the name and e-mail of a person who will respond to questions and suggestions. This contact person should check and answer their e-mail at least every other day and twice a day starting a month before the conference.

In addition to the links, the home page should include the logo, the theme of the conference, dates and times and an expanded mission statement singing the praises of the conference with an abbreviated description of the program and the names of keynote speakers.

It is preferable if delegates can pay for registration and venue with a credit card but if that is not possible they should be able to register by e-mail and send a check by mail or pay upon arrival; a far more cumbersome procedure.

The internet page may be the introduction to the ITAA by newcomers. Therefore it should be written with newcomers in mind so as to welcome lay people and professionals to join us

Chapter 7: Continuing Education

A conference that offers continuing education units is a positive draw for individuals who may be new to the theory and practice of transactional analysis. These credits are certified by an agency which has contacts with licensing boards in states requiring credits to maintain a license to practice. For example, in California, the Board of Behavioral Science Examiners requires 18 CEU credits every year. Although these units may not be required yet in other countries, having the certificate of attendance is a positive entry on any resume.

This job requires the coordinator to be on site before and after presentations, and will give out certificates at the completion of the conference. The agency certifying these units needs a resume on the presenter, an outline of the presentation, plus the learning objectives to be spelled out in detail, <u>before</u> the conference takes place. The attendees will fill out a small test after they have attended the presentation.

United States of America Transactional Analysis Association

Conference Presenter Information Sheet

NOTE: Please fill out all the information below. This information is necessary for USATAA to grant CEU's by NBCC &others.

A.   Name:_____

B.   Current Employment:

    Title: _____

    Place: _____

    Address:

    Date of Initial Employment:

C.   Educational Background:

Undergraduate Degree	Major	Year
University		
Graduate Degree	Major	Year
University		
Graduate Degree	Major	Year
University		

D.   Special Training Relevant to Topic Area(s) Presented:

E.   Licenses and Certifications Held:

    (If trainer is a professional counselor and is not certified by NBCC or licensed by a state as a LPC, please use the back of this sheet to justify the trainer's expertise.)

F.   Other pertinent information relating to individual's background as it relates to provision of continuing education activities._____

USATAA

Conference Evaluation

Pre-Conference _____ Panel _____ Breakout Session _____ TA101

TITLE OF PRESENTER:

PRESENTER(S) _____ DATE: _____

INSTRUCTIONS:

    Below are several statements. Please read each statement carefully. Then, using the scale listed below, rate each statement as accurately and candidly as you can. Place the number of the response in the rating scale that most closely reflects you evaluation, in the blank next to the statement. Below the statements there are spaces for you to express your personal opinions and views, please write as much as you like and feel free to write on the back of this form. Your evaluation and comments will help us better serve your professional development needs.

    (5) Strongly Agree (4) Agree (3) Undecided   (2) Disagree (1) Strongly Disagree

1. _____ The presentation goals and learning objectives were clearly defined.
2. _____ The subject matter was well covered.
3. _____ The subject matter was relevant and significant.
4. _____ The presentation was well planned and organized.
5. _____ The audio/visual materials (if used) were appropriate for the material covered.
6. _____ The presenter was knowledgeable about the content and subject matter.
7. _____ The presentation ranks favorably to similar ones that I have attended.
8. _____ I would attend other presentations by this presenter.

Which portion of the program was most beneficial to you?

What subjects or topics or presenters would you like for us to schedule in the future?

Other comments: (please feel free to write on the back of this form)

SAMPLE: CALL FOR PROPOSALS

We invite you to submit your program ideas for consideration.
Please provide all information requested below, using this form or a copy of your information cover sheet.
Presentations of new ideas will be given priority
Proposals must be received by October 1, 1994

INFORMATION COVER SHEET
Title of Presentation:

Name and Academic Credentials, ITAA Certification: If none, please include a written endorsement from a Certified Member.

Address: Street_____

              City _____

              State _____ Zip Code

Telephone:
      Home(   ) _____

      Work (   ) _____

      Fax (   ) _____

      Email_____

Co- Presenter(s) Name and Credentials:

What do you hope to accomplish during your presentation?

Format: (Lecture, discussion, panel, experimental, etc.,)

Duration:	1/2 hr	3 hrs	50 mints		
Level:	Beginner	Intermediate	Advanced		
Limit of Group:	20	30	40	50	No Limit

APPENDICES

The following appendices have been more or less randomly collected over the years and can be useful in highlighting some of the issues that are important in running a conference. They don't pretend to be complete or even understandable. Use at will and at your own risk.

AN OVERVIEW OF A CONFERENCE PLANNER'S ORGANIZATIONAL CHECKLIST

Where to start...

Budget:
Obtaining a range of quotes for what will be required can make an early estimation of overall conference costs. Once determined, details may be confirmed and careful planning will keep costs in check.

Main objective(s) of the Conference:
A clearly stated understanding of what is expected and what outcomes one wants in course of the planning (of both the clinical and social programs) will add to the motivation for the internal staff. It also improves public relations and clarifies the publicity to follow.

Publicity and Public Relations:
Pre-and post conference publicity ranges widely. THE SCRIPT and the official news organs of the regional associations have been the media for the conference announcements and ongoing publicity. Local host's best determine local publicity. Announcements of the conference in international publications can be arranged by the ITAA. Other media and public relations activities are subject to the budget and desires of the organizers, such as flyers, regarding travel costs to and from the conference site, the costs and schedule of social events, and the whereabouts of nearby restaurants and regional attractions of interest and entertainers from which conference attendees can choose.

FORMAT FOR A CHECKLIST IN ORGANIZING A CONFERENCE

This checklist, from the Sheraton Meeting Workbook is offered as a prototype only.

Meeting Management Timetable

Careful scheduling can make or break a meeting. Here's a framework upon which you can hang the dates of your most important responsibilities and watch there progress over the months. For smaller meetings, you may only have half the time shown here, but it's still essential to prepare a calendar and mark deadlines. It's the only way to make sure the details don't fall through the cracks.

18-24 Months Ahead	Target Date	Completion Date
Select dates		
Select a hotel or conference center		
See the facility (site inspection)		
Book meeting, banquet, and sleeping room space		
Prepare preliminary budget		
Negotiate with and obtain signed contract from facility		
Program development		

12-18 Months Ahead	Target Date	Completion Date
Determine theme of meeting		
Begin search for speakers		
Plan business and social agenda		

9-12 Months Ahead	Target Date	Completion Date
Contract with Speakers		
Review program with facility		
Review program with facility and ground operator		
Book sports events with facility or nearby properties		
Send first mailing list		

6-9 Months Ahead	Target Date	Completion Date
Make special travel arrangements with airlines or agent and advise participants		
Review audiovisual needs; obtain producer or advise facility		
Review program with principals		
Revise specifications with facility as necessary		
Contact with ground operator		
Refine budget		

3-6 Months Ahead	Target Date	Completion
Corresponding with participants: send reservation cards to participants (if appropriate)		
Have preliminary agenda typeset		
Select menus for special theme functions		
Get name badges printed		
Have signs prepared		
Confirm speaker special requirements, handouts		

6 Weeks Ahead	Target Date	Completion
Finalize agenda		
Select final food and beverage requirements		
Get speaker special requirements, handouts		

4 Weeks Ahead	Target Date	Completion
Send spec sheets to facility		
Send rooming list (or check with facility on reservation cards)		
Review facility banquet event order and advise of any changes		
Review program with all speakers and presenters		
Have final program printed		
Have registration packets prepared		
Prepare roster of attendees for registration packet		
Obtain all handouts for shipping to facility		

2 Weeks Ahead	Target Date	Completion
Ship material to facility		
Review audiovisual program with producer and individual presenters		
Review program with facility		

Day Before Meeting	Target Date	Completion
Walk through the program at meeting site		
Review all setups, including registration area		
Review rooming list with front desk		
Have pre-conference meeting with all appropriate personnel		

LANGUAGE OF THE CONFERENCE: The primary language of this conference is English, with secondary languages Spanish and Japanese.

Language of your Presentation: [   ] English [   ] Spanish [   ] Japanese

ABSTRACT: Attach a typed abstract of up to 100 words describing your presentation. The abstract will be used in conference publicity. (If your presentation is in a language other then English, please attach a typed translation of the title and 100-word description)

BIBLIOGRAPHIC SKETCH: Attach a brief 20 word personal description (in English). A recent photograph will be requested later.

OUTLINE: Attach an outline of up to two pages describing what will happen during your presentation. In particular, if your presentation is experimental or involves the audience, you need to address the issues of safety and protection from intense emotional or physical experience.

ADDITIONAL INFORMATION:

FEES: Presenters attending the conference pay the full fee

EQUIPMENT: Conference rooms have moveable chairs and flip charts. You are responsible for providing and arranging for any additional equipment.

AUDIO TAPING: Some presentations may be audio taped. Please sign here to give the Conference permission to audiotape your work, and for ITAA to offer the tapes for sale.

Signature   Date

RETURN YOUR PROPOSAL BY OCTOBER 1, 1994 TO:

A FORMAT FOR PRESENTER'S AGREEMENT/CONTRACT

PRESENTER AGREEMENT

Please complete and return this form to the ITAA.
I, _____ , will present the following program at the (1992)
ITAA/NZTAA Joint Annual Conference:

Title: _____

Highest Academic Degree: _____

ITAA Credential, if any: _____
(___) _____   (___) _____
Daytime Telephone   Evening Telephone

TA Affiliation:
(ITAA,   USATAA,
CATA, EATA, ICTA): _____

Day/Time Scheduled: _____

Co-Presenter, if any: _____

Room Arrangement: Theater _____ Informal _____ other _____
Equipment: There is a limited budget for audio/visual equipment. Workshop rooms will be
equipped with a blackboard and chalk or a flipchart and markers. If you need additional
equipment, please specify how you will provide it.

Conference Registration: To help ensure the success of the Conference, all Presenters are
expected to register (Fee US$ 175; after 9/16 US$ 200).

This agreement, signed and returned to the ITAA, continues a commitment from you to make the
presentation listed above.

Signature   Date

Signature (Co-Presenter)   Date

PLEASE RETURN THIS AGREEMENT, SIGNED AND DATED (BY ALL PRESENTERS
WHERE THERE ARE TWO OR MORE)

PRESENTER'S GROUND RULES FOR PROVIDING CONFIDENTIALITY AND PROTECTION TO PARTICIPANTS WHO ARE WORKING IN GROUP EXPERIMENTAL SETTINGS.

In order to avoid any violations of the protection that we strive to live and teach by, the ITAA Program Committee drafted the following list of rules for each presenter to review with participants.

All presenters are asked to begin with a brief coverage of the following ground rules:

1. Confidentiality

2. The right to pass

3. All opinions honored

4. Personal responsibility

LETTER ACKNOWLEDGING PRESENTER'S ACCEPTANCE, ENCLOSING
PRESENTER'S CONTRACT AND ANNOUNCING SCHEDULED TIME

December 22, 1994

Landy Gobes
1168 New Britain Avenue
West Hartford, CT 06110

Dear Landy:

Thank you for your willingness to present a pre-conference institute at the first major
International Transactional Analysis Conference in San Francisco August 7-13, 1995. The theme
of the conference is "New Wine from Old Roots" and we are eagerly looking forward to your
new ideas on the theory and practice of transactional analysis. It is because of contributions such
as yours that this conference will be a success.

We have your presentation entitled: "Psychotherapy with the Parent Ego State" scheduled for;
Monday August 7, 1995, from 9:00-5:00.

Thank you for sending in your title, 100-word description, 50-word biographical sketch, and
photographs.

Please sign the enclosed Presenter's Contract and indicate your willingness (or not) to be audio
taped, and return it to the ITAA headquarters as soon as possible.

The Conference Committee and Board of Trustees appreciate the energy and talent that you will
bring to this Institute. Thank you for your fine presentation! We look forward to seeing you in
San Francisco.

Sincerely,

"WAIT LIST" PROPOSAL ACCEPTANCE

January 12, 1995

TO: _____

RE: Proposal #*1*

Dear

Thank you so much for your proposal for the MITAC Conference. It was well received by the Program Committee.

However, due to the number of excellent proposals submitted, we are unable to include your proposal at this time. We are placing it on "hold" should a slot become available.

When we undertook this task we had little idea of the quality and range of presentations submitted. And it has taken a long time to arrive at this decision with five other colleagues reading all proposals and sending their comments on to us.

We look forward to seeing you at the conference and thank you for your time in submitting your proposal.

With Best Wishes

LETTER OF REJECTION OF A CONFERENCE PROPOSAL

Dear Colleagues,

Thank you so much for your proposal for the MITAC Conference. It has been the most interesting and difficult task to provide a balance of nationalities, topics, levels, and special areas. For this reason, and for this reason alone, we have had to put aside excellent proposals, which would have been a pleasure to include.

We hope that you will forgive us not including you this time. When we undertook this task we had little idea of the quality and range of the presentations submitted, and it has taken a long to arrive at this decision with five other colleagues reading all proposals and sending their comments on to us.

We look forward to seeing you at the Conference and thank you for your time in submitting your proposal.

With best wishes

RESPONSE TO SUBMITTED PROPOSAL

Dear _____ ,

      We received your program proposals on _____ and will make final decisions about which proposals are included by _____ .

      We appreciate your interest in the coming conference and your willingness to support it with your presentation. The primary factor in deciding which proposals will be used is the relevancy to the conference theme. The second factor is having a wide spread of ideas and application areas.

Your proposal is:

             [ ] Complete [ ] Inaccurate/Incomplete

             [ ] 100 word summaries are too long for program book.

             [ ] 100 word summaries are missing

             [ ] 20 word biographical sketch is too long for program book..

             [ ] 20 word biographical sketches are missing.

             [ ] Information sheet is missing

             [ ] Information sheet is missing. Items missing:_____

             [ ] Proposal outline is missing. Items missing:_____

Sincerely,

LETTER OF ACCEPTANCE OF A CONFERENCE PROPOSAL

January 4, 1995 To:

Sharon Kalinko

Dear Sharon,

The Program Committee is very pleased to inform you that we have accepted your proposal; entitled "Shame and Symbiosis in Group Psychotherapy" for presentation at the First Major International Transactional Analysis Conference in San Francisco, August 7-13, 1995. If you sent in another proposal, you will receive notification about it separately. This letter concerns only the proposal named above.

Please read, complete, and sign the attached Presenter's contract, then return it to Elizabeth Ott, the Conference Coordinator at ITAA headquarters. The contract should be signed and returned no later than January 23, 1995.

If you have a co-presenter, he or she will NOT receive a separate notification of your acceptance. Please be sure that your co-presenter sees all program-related communications, has access to all of the necessary contractual agreements, and co-signs the Presenter's Contract!

Your presentation is scheduled for a 3-hour slot on Thursday, August 10, 1995, from 2:30 to 5:30pm. Please know that the Program Committee did everything possible in scheduling, and we are asking you to accept the time slot we have provided you. The scheduling has been worked out taking many variables into consideration, so please do not ask for a schedule change unless it is absolutely impossible for you to present at your scheduled time. Should you need to make such a change, however, please immediately call the Conference Coordinator at the ITAA office number below, as we are about to go to press with the conference publicity.

We will be publishing a program booklet and need a recent photograph. Please forward this when you return your Presenter's Contract. In addition, please indicate on the Presenter's Contract your permission (or not) to audiotape your performance, as we will be having workshops audio taped and these audiotapes offered for sale.

The conference committee and board of trustees appreciate the energy and talent you will bring to this conference. We look forward to seeing you in San Francisco, for the first Major International Transactional Analysis Conference of the ITAA!

Sincerely,

INSTRUCTIONS TO REVIEWERS OF SUBMITTED PROPOSALS

October 7, 1994 To

Program Reviewers:

Enclosed are the program proposals for the 1995 MITAC Conference. There are 80 total to review. Of this 80,_____ are educational, and _____ are organizational.

Enclosed with the proposals are 80 review forms for your convenience. Please read your proposals, and then rank them using the form provided.

Please mail your completed review forms (we do not need the copies of the proposal back) to the ITAA office by November 1, 1994. We will duplicate and forward your reviews to the Program Chair Julie Hewson.

For your information, we have the following table that shows the slots to fill, according to the latest draft of the program, dated September 22, 1994 (still subject to change):

Invitational Presentations:

10	Pre-conference institutes (invitational)
5	Keynoters (invitational) who get a 1.5 or 2-hour workshop_slot
3	Informal breakfast discussion group lecturers (invitational)
27	*2-hour "invited presentations" (Some of these may go to proposals submitted by open review

To	Be Selected From Open Proposal:
15	3-hour workshops
30	1.5 hour workshops

*See note above about the 27 two hour "invited presentations" (some of these may go to proposals submitted by open review)

Thank you very much for your willingness to serve in this important capacity for the 1995 program.

Sincerely,

INVITATION TO PARTICIPATE IN AN INSTITUTE

The International Analysis Association, Inc.
1772 Vallejo Street
San Francisco, California 94123 U.S.A

March 28, 1986

Dorothy Jongeward 724 Ironback Ct.
Orinda, CA 24563

Dear Dorothy,

Next January the International Transactional Analysis Association and the Western Pacific Association of Transactional Analysis will join together to co-sponsor the first International Congress to be held in the Pacific. A preliminary flier describing the Congress is enclosed. The theme of the Congress is "East Meets West." We anticipate that 300 people will attend.

We are pleased to invite you to participate in this Congress by offering a one-day pre-congress Institute on Tuesday January 20, 1987.

Please respond to this invitation by return mail. We hope you will give serious consideration to the request. Interest in TA is very high in Singapore and in other areas of Asia and the Pacific, and your work is well known in the region. By accepting, you could contribute greatly both to the success of the Congress and to spreading TA theory and practice in the area.

If you are able to accept, please send us an institute description, a curriculum vita, and a black and white photo. (Unless you are sure we have one to use in our publicity.)

The pleasure of your participation will be enhanced by a modest $100 honorarium.

We look forward to your positive response to this invitation, and to your participation in this valuable Congress.

Sincerely,

INVITATION TO PARTICIPATE ON A CONFERENCE PANEL

September 6, 1994

Dear (_____)

The Aruba conference committee is planning a final theme panel for Sunday morning, October 30 from nine to eleven. We have in mind a rather informal and open format, in which panel members from differing regions and cultures will speak briefly on the current manifestations (positive and negative) of anger and aggression within their own countries. This may include aspects of anger within the society, within the family, in the media and communications, between the sexes, as a catalyst in mobilizing group actions, etc. Whatever idiosyncrasies you find cogent on this topic that offers a perspective from your region of the world.

The timing will consist of an hour of 4-6 panelists' presentations in five minute segments, allowing added time whenever appropriate for translations from Spanish/English or vice versa. This will be followed by an hour of audience participation with "open mike" questions and discussion as well as input from those folks from areas we were unable to include on the panel.

With this final segment of the conference, we hope to provide both an expansion of the conference theme to social issues worldwide and a synthesis and summary commentary to wrap up the ideas brought out during the week.

In selecting panelists, we felt that you would be a particularly apt choice as a representative from your country. Invited panelists include: Charlotte Christophe Lemke (Germany), Conchita de Diego (Spain), George Kohlreiser (USA), Octavio Rivas (Mexico), Bernardo Aguilera (Venezuela), and Nelida Gomez (Puerto Rico). I will act as moderator.

Please let me know as quickly as possible your willingness (or not, alas!) to participate. Preferably we're hoping you will reply by fax or phone to the ITAA office (to Susan Sevilla or Elizabeth Ott) within the next few days. I'm looking forward to hearing from you, even more, to seeing you there.

Sincerely,

Marilyn R. Marx, Ph.D
Conference Chair

LETTER OF CONFIRMATION OF ACCEPTANCE OF KEYNOTE SPEAKER

June 1, 1994

John Dusay, MD 2709 Jackson Street San Francisco, CA 94115

Dear Jack;

Thank your for your willingness to participate in the Major International Transactional Analysis Conference (MITAC) to be held in San Francisco August 7-13, 1995. The theme of the conference is "New Wine from Old Roots." As I described on the phone, your written ideas are a major contribution to TA and we would like to feature your work as part of this major conference.

We are interested in having you make a presentation about what you originally learned from Eric Berne, how you uniquely put those ideas together in your article, "Egograms and the Constancy Hypothesis", and then, what changes and new developments you would introduce into that article if you were writing it today. We are particularly interested in how your ideas have changed and how you have developed professionally in the intervening period of time. I envision this to be a formal presentation of about 45 minutes. This ideally would then be followed with a group of three or four discussants that would each have 7-10 minutes to present their ideas to the audience. The total time will be about 2 hours.

We are expecting a large number of participants from outside the United States, many of whom want to hear your ideas, know where they came from, and where you are with those ideas today. It is also important that the discussants come from a wide geographic area, if possible: ideally one from Asia, one from South America, one from Europe, and perhaps one American or Canadian. We would like your suggestions for discussants whom you think would provide some challenging insights into your work. It would be most efficient if you would make the initial contact with your discussants, but if that is not possible, give me a call and let's see if I can make the arrangements.

As you probably know, International Transactional Analysis members are not paid an honorarium for their participation in conferences and are required to register and pay all conference fees. Because of this personal invitation, though, it is not necessary for you to provide the elaborate outline requested on the program proposal form. I do need, however, a title, a 100-word description of your presentation, a biographical sketch, and the names of your proposed discussants by the end of August 1994. For your convenience I have enclosed a proposal form. I would also appreciate it if you would send me phone numbers where I can reach you so that we can arrange the final program.

Thank you once again for your willingness to be involved in this conference. I am looking forward with excitement to the ideas you will be presenting.

Sincerely,
SAMPLE: CONTRACT ADDENDUM

Hotel Nikko San Francisco

December 13, 1993

Ms. Susan Sevilla
Executive Director

The International Transactional Analysis Association, Inc.
1772 Vallejo Street
San Francisco, CA 94123-5009

SUBJECT: Addendum to ITAA 1995 Contract

Dear Susan:
Per our conversation, the following addendum will be part of our signed agreement of November 19, 1993:
Children (18) years and under are free in parents room.

1) August 7-12, 1995 (Mon-Sat) registration with bookstore.
2) August 12, 1995 (Sat.) Reception for 250 people.
3) August 13, 1995 (Sun.) Brunch for 250 people.
4) August 13, 1995 (Sun.) TEW set informal for 30 people.
5) August 14-15, 1995 (Mon-Tues) (2) Breakouts 8am-5pm set informal (20) people.

(12) Table top exhibits at no charge in the Foyer Area.
(2) Complimentary flip charts for duration.

Sliding Scale as follows:

600 + above Complimentary 550 - 599
$1500.00 total for week
450 - 549 $3000.00 total for week
449 + below $4000.00 total for week

Susan, as confirmation of this agreement, please sign and return at your earliest convenience. Please contact me if I can be of further assistance.

Best Regards,

Vince Perez
Sales Manager

VP: ssm
CC: Barbara Curtis, Reservation Manager
SAMPLE: ITAA EXHIBIT RULES AND REGULATIONS

Location:
The exhibit area will be located in the

Cost of Display Space:
Exhibit rental fee is %200 for each table and $100 for each half table which includes: tablecloth and tow chairs. Electricity is not provided but may be available at extra charge.

Assignment of Exhibit Space:
Space assignments are based on the order in which reservations are received. ITAA reserves the right to adjust space assignment when necessary.

Use of Exhibit Space:
Exhibitors must confine all demonstrations or promotional activities to the limits of the exhibit booth. Sufficient space must be provided within the booth to contain persons watching demonstrations and other activities. Exhibitors are responsible for keeping the aisle or aisles near their booth free of congestion due to demonstrations or other promotions. No exhibitors shall assign, sublet, or share space without the knowledge and consent of ITAA. Organizations or firms not assigned exhibit space will not be permitted to solicit business within the exhibit hall. Exhibitors are urged to report any violation of this rule to ITAA. Interference with the light and space of other exhibitors is prohibited. All sound equipment and other noises must be kept at a low enough level that it will not disturb other exhibitors. Public address systems, radio broadcasts, or any other devices used only to attract attention by sound are prohibited.

ITAA reserves the right to restrict or evict exhibits that become objectionable because of noise, method of operation, materials, or any other reason the ITAA may have an opinion on. This reservation includes persons, things, conduct, printed matter, or anything of a character that ITAA determines is objectionable. In the event of any restriction or eviction, ITAA is not liable for any refunds or other expenses.

Exhibitor Services:

Table, chairs, carpeting, electrical outlets, additional booth furnishings, audio-visual equipment, material handling, etc. are the responsibility of each exhibitor and may be arranged through ITAA's official contractor at their standard rates. An exhibitor service kit will be mailed to each exhibitor with confirmation of booth space. Order forms should be completed early to insure proper set-up at the MITAC Conference. Exhibitor badges will be distributed on-site during exhibit installation.

Security:

Professional security guard service will not be provided after exhibit hours. All materials must be removed after each exhibit day. Neither the ITAA, nor the Hotel Nikko is responsible for a loss or damage to exhibitor property.

Liability Insurance:

Exhibitor assumes the entire responsibility and liability for losses, damages, and claims arising out of injury to persons or damages to exhibitor's displays, equipment, or other property brought up on the premises of the hotel Nikko and agrees to indemnify, defend and hold harmless the International Transactional Analysis Association, the hotel Nikko, and its owners, servants, agents, members, and employees for such losses, including reasonable attorney's fees, arising out of the use of the hotel premises excluding any liability caused by the negligence of the International Transactional Analysis Association or the Hotel Nikko or its owners, servants, agents, members, and employees. The Exhibitor understands that neither the International Transactional Analysis Association nor the Hotel Nikko maintains insurance covering the Exhibitor's property or lost revenue and it is the sole responsibility of the Exhibitor to obtain such insurance.

A GUIDELINE FOR OFFERING CONFERENCES WITH CHILDREN AND YOUTH PROGRAMS

Coordinator needs to figure out all of the below:
What age groups?
Suggest: Age 0-2, Caregiver ratio 1:3
                Age 3-6, Caregiver ratio 1:5 Age 6-10, Caregiver ratio 1:6 Age 11-16,
                Caregiver ratio 1:6
                Age 17-20, Defined as "Youth Counselors", and help in other programs

Rooms needed; At least 3 rooms needed, preferably suites:
Age 0-2 and 3-6 in one suite Age 6-10 in one room Older ages in one room

Duration of the Youth Program:
Recommended 3.5 days only, Thursday, Friday, Saturday, and Sunday morning, during workshop hours only

Hours of the Program:
8:30-12:15, and 1:45-5:30pm only

Meals: Parents responsible for breakfast and lunch. (Note: Are we responsible for snacks?)

Program Components:
Do children remain in hotel during program?
Will there be an educational component? (Laurie Kahn)
Will older children have a chance to go on field trips? If so, with an outside agency or our own teachers?

Insurance:
Need liability insurance.
Even with insurance, still need a release of liability from parents.

Budget:
Rooms: At Nikko, 4 nights @ $314.4/night (incl. Tax) = $537.60 per room. (3 rooms = $1,612.50!) Can we ask children to pay $30 per day? If so, we need a minimum of 5 children/day per age group to break even on rooms alone. This doesn't take into account materials: snacks, supplies, program materials, and field trips.

LETTER INSTRUCTING PRESENTER'S RE EVALUATION FORMS

October 1994

Dear Conference Presenter,

Welcome to the 1994 ITAA/ALAT Joint International conference in Aruba! We are looking forward to your participation. Your contributions are essential to the success of this valuable educational experience.

Ever since 1983 we have been soliciting participant evaluation of workshops, and they have been most useful to us in planning for future meetings. A key factor in obtaining a good return rate on participant evaluations is that presenters take responsibility to see that they are completed and turned in. The Conference Committee would like to invite you to help in the process of obtaining valuable and useful feedback from the attendees of our program presentations. You will also benefit as a presenter by having feedback on your presentation.

Please stop by the Registration Desk prior to your session and collect a supply of evaluation forms (see sample attached). At the close of your workshop, please ask each participant to fill out the evaluation and either: a) give it to you, or b) leave it at the Registration Desk.

If you wish, you may read your evaluations (of course keeping them anonymous as to who said what) <u>before</u> you turn them in to the conference Registration Desk, as it is not possible for the office to give you that feedback after responses have been tallied for our internal use.

Thank you for your cooperation. We hope your workshop is a great experience for you and your participants.

Sincerely,

FORMAT AND RESPONSE TO CALL FOR PROPOSALS

ANNOUNCING: ITAA/MICTAA JOINT CONFERENCE
                         CALL FOR PROPOSAL

Theme: "Partnership"
November 7-16, 1992

Waipuna Hotel and Conference Center, Auckland, New Zealand

You are cordially invited to submit program ideas for consideration. Please include in your proposal submission; 1) an information cover sheet (below), 2) an abstract of up to 50 words, 3) a short biographical sketch, and 4) an outline for your presentation. Deadline for returning this cover sheet is December 1, 1991 Information Cover Sheet

Title of Presentation:
Example: Conflict Management: Creative use of Attachment Theory

Name: Include academic credentials and ITAA certification:
Example: George A. Kohlrisser, Ph.D., CTM

Address: Street, City, State/Postal code, Country
Example: 345 Shiloh Springs Rd. Payton, Ohio 45414, USA

Format: Most workshops will be 1.5 hours didactic presentations; there will be limited options for 1 hour and 3 hour presentation. Specify: Lecture, Discussion, Panel, Paper, Experimental, etc.
Example:

Duration: ___ 1.5 hours X 3 hours _____ paper (+50 minutes)
Area: X Clinical _____Organizational _____ Educational Other_____
Track: __ Theory _____Treatment _____ Social Issues _____ Comparative
Modalities: __ Marriage & Family X Special Applications Other _____
Level: ___Beginner____Interim _____ Advanced   _**X**Practicing Psychotherapist
Size Limit of Group: 20   ___ 30   ___40   X No Limit
Language of the Presentation: X English other_____

Co-Presenter(s):

Name and Highest Academic Degree

You are responsible for contacting co-presenter and for ensuring their attendance/replacement.
*Note: Equipment needed: (chalkboard, flipchart, moveable chairs, etc.)
It will be difficult to obtain audiovisuals equipment. If you need any, please describe how you will supply it. Example: Flipchart, Moveable chairs, Overhead Projector
SAMPLE DRAFT OF A CONTRACT FOR A DESIGNATED CONFERENCE BETWEEN AFFILIATED TA ORGANIZATIONS AND THE ITAA

The contract for a designated conference is between the affiliated TA organizations and the ITAA, IAS International, INITA Germany, and The International Transactional Analysis

REPRESENTING IAS INTERNATIONAL:
Servas Van Beekum, Drs.
Westerhoustraat 48 NL 2012 JS Haarlem The Netherlands

REPRESENTING INITA, GERMANY:
Matthias Sell Langensalzastrasse 3-5 D-30169 Hanover Germany

REPRESENTING ITAA:
Charlotte Daellenback, Vice President of Operations
(Servaas Van Beekum, ITAA President, defers to Vice President, since he is in this case representing IAS International)
450 Pacific, Suite 250 San Francisco, CA 94133

The above-listed representatives of IAS International, INITA, Germany, and the ITAA agree that it would be mutually beneficial to the 3 organizations to hold a designated Conference in Amsterdam. The Conference will be held on Thursday, Friday, and Saturday, March 14-16, 1996, at the Hotel Novotel, Europaboulevard 1o, NL 1083 AD, and Amsterdam, Netherlands. The Conference will be an "Advanced Working Conference on Ego States in Transactional Analysis". This conference will be the site of ITAA Board and committee meetings. We anticipate that Board and committees will meet on Tuesday and Wednesday, March 12-13.

In creating this designated conference agreement, we have drawn upon the precedents set in 5 precedents of ITAA designated conferences: The CATA Conference April 1997, Mississauga, Canada; The British TA Association Conference March 1992, Brighton, US; The ICTA Conference January 1993, Cochin India; The DGTA Conference May 1994, Nurnberg Germany; and the Singapore TA Association Conference March 1995, Singapore

The following agreement was worked out between Servaas Van Beekeum, Mattias Sekk, Charlotte Daellenbach, and Susan Sevilla, and has been reviewed by ITAA Treasurer Tony Metcalf. All are in agreement with the following points:

ITAA Will Offer The Following to IAS International and INITA Germany:
•   The ITAA Executive Director and staff will offer advisory supports to the local organizer in the planning promotion of conference.
•   The ITAA will provide free mailing labels for their members (CTA, PTSTA, AND TSTA), and the ITAA will provide free advertising in the Script of at least 2 half pages (in 2 separate issues.)
•   If BOC exams are approved for this site, then the BOC will organize examinations, with the help of a local Exam Coordinator. (Note, as of June 27, 1995 BOC exams are not approved.)

IAS International and INITA Germany Will Offer the Following to ITAA:
•   The IAS International and INITA Germany will plan and organize the conference, including all aspects of the program, scheduling, promotion, the budget and the administration of the conference. IAS International will collect all registration fees.
•   Free meeting rooms: free meeting rooms will be provided for the ITAA Board on Tuesday and Wednesday, March 12-13. Meeting rooms for Committee meetings will be negotiated with the hotel when it is clear how many are needed. ITAA should be clear about the number of rooms by February 1, 1996. The ITAA will be responsible for its own catering (catering= lunch service, coffee/tea breaks) for the meetings, and for supplies (flipcharts). At this time, the cost of catering for meeting rooms is *55f* per person per day (approximately $35 per person per day).
•   Free sleeping rooms: 2 free sleeping rooms will be provided for the ITAA President and Executive Director for the duration of the conference plus meeting time. If possible, we request that the room for the President be a suite large enough for a meeting of 10 people or a standing reception for 20.
•   A percentage of the profit of the conference will be paid to ITAA. For this conference we agree on a profit split of 33% (with 33% each to also go to IAS International and INITA Germany as organizers).
•   In the case that there is no profit, there will be no payment to ITAA. However, in the case that there is a loss, the ITAA will not be responsible for payment of any portion of the loss.
•   IF BOC exams are approved for this site, then it is expected that the local organizer will provide suitable exam rooms for the examinations at no charge to the BOC.

This designated conference agreement has been reviewed by the ITAA Board of Trustees at their meeting in San Francisco in August 1995, and has found to be satisfactory. The signatures below signify that these terms are acceptable to ITAA, IAS International and INITA Germany.

On Behalf of ITAA: On Behalf of IAS International:
Charlotte Daellenabach   Servaas Van Beekum, Drs. IAS
Vice President, ITAA   International

Note: Exchange Rate in June 1995: *lf* = .6345US Amsterdam. Let

Sample: Hotel Nikko San Francisco Contract

November 3, 1993

Ms. Susan Sevilla Executive Director

International Transactional Analysis Association
1772 Vallejo Street
San Francisco, CA 94123-5009S

Subject: Addendum to ITAA 1995 Contract

Dear Susan,

The Hotel Nikko, San Francisco is delighted to have the opportunity to host the International Transactional Analysis Association's Annual Conference in August 1995.

Based upon the information we discussed, the following space is presently reserved for your group on a tentative basis.

Guest Room Accommodations:

Day:	Sun	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Mon	Tues
Date:	8/6	8/7	8/8	8/9	8/10	8/11	8/12	8/13	8/14	8/15
Single/ Double	15	40	80	140	150	150	120	20	10	5
Total:	15	40	80	140	150	150	120	20	10	5

Rates:
Run-of-House Category: $120.00 single/double occupancy Nikko Floors: $165.00 single/double occupancy *Applicable city tax: 12%
*Application adults 18 and over = $25.00 each night *Children under 11 are free in parent's room
Please note that these rates are not non-commissionable and are subject to the applicable taxes.

Complimentary Accommodations:
In consideration of the agreement and with the understanding that stipulated rates are agreed upon, Hotel Nikko, San Francisco will provide complimentary sleeping room credits on the basis of one complimentary room credit per every 50 room nights actually utilized. The availability of complimentary accommodations must be used during the conference dates or the allotment will be void. Credits for complimentary rooms not assigned will not be applied to the master bill. Your complimentary credits may also be used for suites as listed below.

<u>Billing Instructions</u>

It has been requested that all guests will be reasonable for paying their own room, tax and incidental charges prior to departure. Per hotel policy, the method of payment must be established upon check-in.

Per your request, a master account will be established for the groups' banquet charges. A deposit equal to 50% of the estimated food and beverage costs will be required by July 5th, 1995

<u>Credit Application</u>

In order to establish direct billing privileges with the hotel, it is necessary to complete and return the enclosed credit application. Upon credit approval, we will be happy to extend billing privileges based upon the policy that the account is due upon receipt of our bill.

We will be happy to review your account with you as required prior to departure. Please advise our credit manager should you wish to develop a daily schedule to review your billing.

Please provide the name, telephone number and address of the contact in your accounting department who will be responsible for reviewing your bill.

NAME: Susan Sevilla Executive Director (415)885-5992 1772 Vallejo
TITLE: Street San Francisco, CA 94123-5009
TELEPHONE:
ADDRESS:
CITY/STATE: The party signing this contract is acting as an agent representing the
ZIP CODE: group or company meeting in Hotel Nikko, San Francisco.

<u>Fitness Center</u>

Fitness Center charges will be $7.00 per day for the attendees of International Transactional Analysis Associate's Annual Conference.

<u>Parking</u>

Hotel Nikko, San Francisco is pleased to provide two (2) complimentary parking passes for your VIP's.

Upon receipt of this signed contract, all information pertaining to your group will be given to our convention services department for handling. The catering/convention services manager assigned to your account will contract you shortly thereafter to begin detailing your group.

*Services + Equipment/Optional
*Signage/Optional
*Exhibit Space/Optional

<u>Packaging Handling</u>

To ensure proper handling when mailing packaged material to the Hotel Nikko, San Francisco, please clearly indicate the following:

*Company Name *Meeting Date
*Name of Catering Sales Manager

<u>Mail to:</u>

Hotel Nikko San Francisco Receiving Entrance 222 Mason Street San Francisco, CA 94102

Please note that the hotel is not prepared to receive packages relating to your meeting or event more than (1) one week prior. Should you require storage for your materials prior to one week in advance, please contact your catering service manager for recommendations on available storage and/or transfer will be the responsibility of the client and billing arrangements must be made directly with the chosen company.

In addition, a box movement/handling fee will be charged as follows:
Regular boxes: 5 lbs - 20 lbs @ $5.00/box
Oversized boxes: 20 lbs - over @ $10.00/box
Exhibit crates: @ $3 0.00/box

At the conclusion of your events, if the hotel personnel are required to pack or ship small materials, we will bill your master account for appropriate charges.
<u>Cancellation Policy</u>

Once this contract has been signed and returned to Hotel Nikko San Francisco by the due date indicated, its terms and conditions are considered confirmed and definite. In the even of a

cancellation up to one year prior to the meeting no penalty will apply. Should the cancellation take place after August 6, 1994, it will result in a fee as liquidated damages; which will be equal to (1) night's peak room night revenue. All attempts will be made to re-sell the space, which will decrease the cancellation penalty. This agreement is based on the outlined room pick-up and the minimum guarantees on the agenda.

Susan, if the above information meets with your approval and you would like to confirm these arrangements on a definite basis, please send to my attention by November 17, 1993.

We look forward to the pleasure of hosting your group and we will do all possible to ensure a successful and enjoyable stay.

Sincerely,

Vince Perez
Sales Manager, ITAA

| Hotel Authorized Signature | Organizational Authorized Signature |

| (Sales Manager) | (Executive Director, ITAA) |
| Title | Title |

| Date | Date |

Approved as revised

#L-3244 (a)
Tentative: File/Reader
Definite: Reservations/Catering/Accounting/Reader

SAMPLE: CONFERENCE FEEDBACK, Pg.1

Volunteers
The MITAC Committee met five times is 1995; January 22, April 8, May 19, June 11, and July 9. The meetings were mainly on weekends and held at ITAA office. An average number of participants at each meeting were 5. Discussions pertaining to everything from opening night, to translation systems, to the budget were discussed. The popular "walk about party" idea was conceived in one of these meetings. Two newsletters, produced "in house", entitled "Host city News" went out to the committee and the local membership. The letter included the latest

conference updates and asked for assistance, i.e., asking for volunteers, asking for donated raffle prizes for the banquet, and informing people of future meetings.

On-Site
There were approximately 18 volunteers who helped out. Since the two designed second languages of the conference were Spanish and Japanese, it was important to try and have someone fluent in each language at the desk during peak times. [Peak times are early morning when the desk opens, coffee break, lunch and when evening workshops break]. A short detailed information sheet was prepared for all volunteers to read. It explained the checking in process, the details of the program and vital "need to know" information. Tasks that the volunteers assisted with were: Packet stuffing, making custom TA fortune cookies, registration desk, ticket takers at pay only events, social events chaperons, passing out awards, and posting signs. At the banquet each volunteer was recognized with a cloisonne pin. Special recognition letters were also mailed post conference.

Thank goodness for the excellent support of volunteers! Their support made the event smooth as well as fun. There were so many it is hard to mention them all. Maria Howard, Elizabeth Cleary and Kate Meredith deserve special kudos; they were great to work with. Robin and Phil were also helpful, especially on the opening night.

Paid Staff
Honorarium of $100.00 to Breanna McAsey for 17 hours of work on-site; Jenny Wong and Molly Murphy were invaluable during the weeks prior to the conference (approximately 22 hours).

Registration Desk
Things at the desk were busy! Refunds for breakfast talks, CEU questions, people coming back continually for badges that had to be typed at the office, people needing copies, people leaving parcels at desk, not to mention the questions. Oh the questions! The questions were endless and kept the desk bustling.

Supplies
We ordered 500 plastic nametags, and 1000 custom-made paper badges (high number to account for mistakes on the computer). We seemed to be a little short on the plastics, another 100 should have been ordered to be safe. We were down to the last one by end of conference. None went without a nametag though. All plastics were used.

Portfolios
We ordered 500 customized portfolios for the participants of the conference. Only full registrants of the conference received portfolios (not the one day registrants or the institute participants). Prior to the conference we feared that, even as registrations were still steadily coming in, that we might run out. PC Nametag was contracted to see if it was possible to order more. At the latest date this wasn't possible. Contingency plan in case folders ran out was to wait until on site to see if we would actually run out, and if so, order folders from an office supply store to have something for registrants until we could order custom made folders for post conference delivery.

"Non Payers"
There was a small contingent of folks who wanted to go to one workshop, a social event or the connections area but didn't want to pay registration fee. While it is agreed that all attending must pay a fee to support the organization, it was a sticky matter on how to enforce this with those who didn't want to pay. Susan will write to those who didn't pay, and see what she can do.

AV
Again, enforcing a no equipment policy is difficult. Presenters were asked on the conference contract, how they would provide additional equipment. Many came to the conference and requested additional flip charts, overheads, or other. Enforcing the "no equipment policy" was another "sticky" situation.

T-Shirts	Rec. Sales	#Ordered	Unit Price	# Sold	Sales Price
Adult	$1246	110	$7.24	95	$15/3 for $36
Child	$150	40	$5.93	18	$9/3 for $24
Pins	$520	250	$2.30	130	$4
Caps	$308	10	$3.85	47	$7/3 for $18

- Additional screen charge for pins was $125
- Screen charge for shirts was $126.64
- Screen and color match for hats was $90.

September 8, 1995

Total bill for T-shirts was $1233.82. We took in $1396.00. Total bill for the caps was $671.91 and we took in $308.00. Total bill for cloisonne pins was $700.00 we took in $520.00.

T-Shirts:	Profit $162.18	Loss
Caps:	Profit	Loss $363.91
Pins	Profit	Loss $180.00

Although we didn't break even on the pins, we had a nice gift for all the volunteers. Sebastiani Wineries had an interest in the pins (someone working at Sebastiani noticed the pin on Kate Meredith when she went there on an excursion. They will be contacted to see if interested in buying the "overs").

Adult T-shirts completely sold out by Thursday afternoon. All that remain are children's shirts. The Japanese contingent seemed to be buying a lot. Caps (71), and pins (72) are still available as are very few kids T-shirts (14).

Video Sales			
Title	Number Sold	Price	Breakdown
TA101	13	$109.00	$109x13 =$1417
Re decision	16	86.00	86 x 16 = $1376
Scripts	15	49.00	49 x 15 = $735

Audiotapes
Total tapes sold: 423; A royalty check in the amount of $635.00 was received by Repeat Performance on October 14, 1995. Complimentary tapes were given to the speakers for their presentations and also a complete set of ITAA. Repeat performance will start a new tally for mail orders.

Support Groups
Number of groups, approximately 6 Number of participants, approximately 60

Organization for these groups need to be undertaken much sooner than two weeks out. Even if there is no coordinator, a potential facilitator, needs to be contacted. This made for a time consuming task and a sticky situation because of the last minute nature of things. The evening time slot was not at all welcomed.

Program
The program was very well received; A fine educational experience.
Number of Presenters:129 Number of Keynote Speakers: 5 Number of Breakfast Talks: 3
Institute that were canceled for lack of enrollment: Crespelle & Crepelle (too early in the week), "Transcript and Family Secret" Lewis and Wise, "Cultural Oppression" (due to topic).

Other cancellations, Pam Levin-back problems; Abe Wagner took her slot. Carlos and Saroj

Welch-no attendance (a late add, not publicized well enough?). Elaine Childs Gowell was added on to the program on site, and presented a workshop.

A small furor was created when a last minute message was taken that Jack Dusay was unable to introduce Muriel James. I'm responsible for misunderstanding this and thinking Jack wouldn't be available to present that day at all (via a message relayed to me that I misunderstood).

Publicity
There was a very early publicity campaign lodged over one year out. For this publicity, an artist was hired, a logo developed, conference "colors" selected. The first publicity brochure was a three-color design, included an "early bird" registration form and promoted San Francisco as a destination. The next promotion was a small three color insert (derived from the first brochure) placed in the 94 billing of the membership dies which went out in late December of 1994. In January 1995 the one page Script publicity was designed. In March the Program Booklet designed. Shortly after this a publicity poster created to promote the conference. The poster, centered around the conference logo, "New Wine from Old Roots" and included the names of the founding members of ITAA, the Board and all presenters, as well other prominent members. Upon reflection it is wondered how effective the poster was, there were hurt feelings regarding missed names. It is mutually agreed that hiring a professional image of the conference was tough.

Walkabout
This was a popular activity; many described this as marvelous." One evaluation said that this activity was worth the trip alone. An estimated 100-150 visited the office in a 2-hour period. Other parties seemed to have even more people.Information on Mary's initial direction sheet was incorrect thus there was some confusion. Her address was typed as Pacific but it is Jackson. There was also an attempted burglary; someone tried to break into Brilliant Media. There were lots of extra plates and cups left over for a future party? Fanita English donated her extras and Ruth Mclendon and Les Kadis' to a charity.

Opening Event
The opening slated to be an event to shape the whole conference was well attended. All three ballrooms were opened up to accommodate 400 + people.

The Four Corners of the room concept was designed to get away from a one main speaker or leader concept. The concept of equality was to be a theme here. It actually turned out that three corners were used, not four. Even though Jack Dusay was urged to make his speech audience participatory, he did not, thus it was a bit dry for such a festive setting.

Translation for this event was handled by having a "Japanese language section" which a small PA system. There were also 5 Spanish Speaking tables utilizing the whisper technique.

There was an exorbitant amount of food leftover. In the future a homeless shelter should be notified to pick up the leftovers so as to not waste food. Why was there so much food left? Was this because we emphasized that it was not a dinner and encouraged people to get their won dinner? The decor was classic and tables looked excellent.

Banquet
We gave an accurate count to the hotel and increased it by 5% and sold that number of tickets. The Hotel was adamant about us not increasing our numbers after that 5% as food had been ordered. There wasn't an empty seat in the house. It was extremely tight. It made for an uncomfortable situation when some people didn't get in. As for the program, too much talk! As in the opening, the tables looked stunning and the service was great. Once the music started the party was in full roar. The band was excellent. In fact the group didn't wasn't to disperse! This resulted in an overtime labor fee charged by the Hotel to keep its staff around after hours in order to turn around the room for the next mornings closing event.

Breakfast Talks
The number of breakfast talk registrants before the conference was quite low (30). So we were taken by surprise with the number of "on site" registrations reached 60! The number at the first breakfast was higher than we thought thus, the more than the hotel was ready for. This created a riff when the food ran out. I was ready to hit the street for more food when I was told there wasn't more food to accommodate additional guests. Joyce Gonzales (Hotel Nikko, Catering Director) finally surfaced o authorize the kitchen to release more food. This consisted of a pound cake (like bread), which wasn't well received by the crowd. Many people were interested in hearing the speakers but not having food, thus attending for no fee. This event was well received. It has a nice thread and theme; three past presidents, speaking on different mornings. The theme was "The World of TA..." connecting, respecting and including. A core group of people kept coming to these, it was something they seemed to enjoy and get into. In the future: accommodate those who just want to attend the talk, and not have breakfast.

Security
Many people were victims of theft. People were leaving personal items unattended and thefts occurred. The Hotel was very responsive and sent in undercover people to patrol, regularly. Security problems due to the neighborhood? Big City?

Translation
Two languages besides English were offered at this conference, Spanish and Japanese. In some cases there was both Spanish and Japanese interpretation of a workshop. This was too much. In the future, there should be planning so as to not have two language translations, only one. Spanish translation team (lead by Ana Tholenaar) used the whisper technique. The Japanese team led by (Michiko Fukazawa) used a small public address system. It has been proposed that ITAA take into consideration purchasing an interpretation system. To take translation out of the conference budget, it is a big financial burden. Since ITAA is an international organization, translation is going to be a future issue. Possibly, if a system is purchased ITAA can contract the system out to other conferences, such as Canada.

Evaluations
Unfortunately, we believe the evaluations were left on the table and then thrown out by the Hotel staff.

Verbal Feedback
The members at the conference were extremely grateful and gracious with their feedback. Strokes came from most!

After reflection and consideration of the experience, my feelings are very positive. I had endless positive comments and feedback. I honestly believe people enjoyed the conference and felt it very well organized.

Report submitted by Elizabeth Ott