

Guidelines That Committee Chairs Need to Know When Planning a Conference with FAE

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Foundation for Accounting Education

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I. INTRODUCTION

Thank you for your participation in the development of quality, relevant, and practical education programs with the Foundation for Accounting Education. Your contribution is very important to our continuing professional education curriculum and to the entire membership and outside professionals we serve.

These guidelines are being provided to you and your committee to give an overview of the requirements needed to develop educationally sound programs. Please utilize these guidelines as a reference when planning your committee's conference, recognizing that the FAE conference staff is your supplement. Therefore, do not hesitate to call us.

Our success and growth has been due in large part to dedicated member-volunteers like you who donate hundreds of hours to planning and improving our programs. Thank you for your continued commitment.

II. CONFERENCE PLANNING ESSENTIALS

If these steps are followed, it will help you and us to be proactive in getting information on time, and major difficulties can be addressed in a timely manner.

1. Immediately after your present conference, planning activities for the next conference should begin 10 months before your next conference date.
2. First: select your conference subcommittee. Assign your conference chairs/co-chairs to lead the subcommittee not because they volunteered, but because they will be committed to a timely, professional and technically relevant planned conference.
3. FAE will work with you (committee or conference chair) to identify a date for your next conference. Once this date is confirmed with you, FAE will secure a facility for the date. Please ensure that there are no similar events taking place on or close to your conference date that you strongly believe will have a negative impact on the attendance at your conference.
4. Once your conference date is confirmed, FAE conference coordinator will be assigned to assist your and your planning committee with the development of the program layout and brochure (promotion) copy. Invite the FAE conference coordinator assigned to your conference to your planning meetings.
5. Review evaluation summary reports of at least the previous two conferences. This will provide your planning committee with critical feedback on topics past attendees are interested in hearing about next time, and on how well your speakers were received.
6. Plan topics based on updates, issues that are hot/new, and/or advancement of the subject matter. If you must repeat topics of the past, highlight what's new and interesting about them. Simply repeating topics and topic descriptions from past conferences will adversely affect the success of the conference. Attendees are looking for newness, relevance, and practical information to add to their knowledge base and tool kit.
7. Select speakers for your topics. Do not use speakers just because they are available. Select speakers based on their knowledge and delivery of the subject.

- 7A. Please note that the FAE is here to assist you in identifying topics and speaker and assist you in your conference planning.
8. If the conference chair is unavailable, designate a marketing liaison from your conference planning subcommittee that will work closely with the marketing department to identify target audiences (inside and outside the Society) and suggest mailing lists, magazines, websites or journals to promote the conference. The Society's marketing manager will research and evaluate all suggestions and execute accordingly, recognizing budgetary constraints.
9. Confirm all your speakers prior to submitting brochure copy to FAE and ask for updated bios and contact information.
10. Encourage each member of your committee to attend the conference. This will enable them to become more actively involved in reviewing the conference performance and making informed suggestions for the next one.
11. Lastly, communicate your progression, challenges, or questions at all times to the FAE conference coordinator. FAE can only help you if we hear from you. Please bear in mind that although you may have an opportunity to speak with other representatives of the Society, the conference coordinator is dedicated to your program and is there to assist you at all times.

III. CONFERENCE PREPARATION SCHEDULE

***Months Before
Conference***

Activity

- 10 Two (2) months after present conference, select the conference chairperson and planning subcommittee. The chairperson receives the *Guidelines*. The chairperson distributes copies of the guidelines to the conference planning subcommittee.
- 9 Hold an initial planning meeting and subsequent meetings with the conference planning subcommittee. Determine target audience, set specific conference objectives, select topics, select speakers, determine conference formats and presentation methods, and determine the content of the manual.
- 6-8 Contact and confirm speakers, develop topic descriptions, complete the **conference brochure copy template** (Appendix 1). Meet with your assigned FAE conference coordinator to discuss content and educational elements of the conference.
- 5 Brochure copy is due in FAE. Submit completed brochure copy to your FAE conference coordinator. Ensure that the Designed for and Objective have been updated to reflect your present program, that all topics, topic descriptions, speakers' names, credentials, firm/company affiliations, and bios, and other program details are included in the copy. After evaluation for completeness, newness, and relevance, brochure copy is submitted to marketing for promotional messages and identifying target audience (inside and outside the Society), then copy is sent to production for design and printing.
- 3 Review program concepts and outlines with speakers. The conference chair must provide FAE conference coordinator with speakers' names, address, phone/fax numbers, and e-mail addresses. Confirmation letters will be sent to speakers thanking them for participating and detailing FAE speaking requirements.

- 2 ½ The FAE conference coordinator confirms with speakers: date, topic, outline due dates, visual aids requirements, and other arrangements.
- 2 Completed outlines of all presentations submitted to conference chairperson and FAE for technical review.
- 1 Camera-ready outlines, audiovisual requirements, and feedback from conference chair are due to the FAE conference coordinator.
- Conference Attend and enjoy a well-developed and well-prepared conference.
Day
- +1 Post-conference wrap-up.

IV. CONFERENCE PLANNING CONSIDERATIONS

Performance-based Objectives

It is important to define the objective of the conference as you begin planning. A learning objective identifies what a participant should be able to do at the completion of learning. Thus, it should be stated in **performance-related** terms. By performance-related terms, we mean the use of such verbs as **identify, perform, write, determine, compute, plan, distinguish**, etc. When you are setting a learning objective, begin with the phrase **"To enable the participant to:"** and complete it with as many objectives as you feel is necessary for the participant to achieve the necessary proficiency in the subject.

The learning objectives that you establish for the conference must be realistic and achievable. Several factors will influence whether the objectives will meet these criteria:

- Length of the program or conference segment.
- Experience level of the target group of participants.
- Level of knowledge established for the participants.
- Presentation methods used.

In a conference with a straight lecture format, it may be appropriate to allow the objective to be "to enable the participant to understand" something. If, in fact, it is realistic to expect that the participants will be able to do something after attending, then state what the conference will enable them to do.

At the conclusion of the objective-setting step, the framework for the conference will be set. With the learning objectives as your guide, determining appropriate content and presentation methods and aids will follow in a logical manner.

Presentation Methods

The most effective education programs have:

- Consistency between learning objectives and presentation methods. If the objectives are to apply, to compute, to perform, etc., the presentation methods should include the opportunity for the participant to practice these activities.
- Participant involvement.
- A variety of presentation methods and aids.

A conference dictates a lecture orientation; however, it will usually be possible to build some group discussion and other features into the program. Varying the method of presentation maintains participant interest and fosters participant involvement.

A group does not have to be small to use active, participant-involving presentation methods. Regardless of group size, a lecture (being the most passive of methods) can be broken up by such devices as a question-and-answer session in which the participants pose the questions, or directed questions posed are by the discussion leader and answered by a participant volunteer. Either of these devices can be designed into a program. Remember that the maximum uninterrupted lecture time before participant attention begins to wane is 15 to 20 participants to lose interest.

Curriculum (Field of Study) Areas

Each CPE presentation is designed under a specific curriculum area. To learn the definitions of these areas, see Appendix 2.

V. CONFERENCES, TECHNICAL SESSIONS, AND COMMITTEE CPE

Formal CPE Conferences and Technical Sessions

One of the most important responsibilities of a technical committee is to disseminate knowledge to the membership. A variety of educational formats are possible through the Foundation for Accounting Education so that Society members can maintain and expand their professional knowledge. The scope and complexity of planned programs determines the type of educational format and the length of the presentation.

Committees generally develop two types of educational programs: conferences and technical sessions. Conferences have the widest scope because they cover several related topics in a full or half-day program. Technical sessions focus on one topic in a three (3) hour presentation.

At the organizational meeting (referred to earlier) of your committee, the group should reaffirm its CPE commitment for the current CPE year. A subcommittee and a sub-chair should be assigned to implement CPE goals/commitments. Decisions may be based upon recommendations of the prior committee, new developments in an area for which your committee is responsible, requests from the membership, or requests from the Foundation for Accounting Education. All CPE presentations must comply with the New York State Education Department's regulation for mandatory CPE credit.

All committee CPE conferences are coordinated through the Foundation for Accounting Education (FAE). Dates and topics are balanced in order to achieve a well-rounded schedule. All locations and facilities will be determined by the FAE as approved by the FAE Board of Trustees based on best practices of the past. Planned presentations must be set by September of each year for conferences to be held in the upcoming CPE year. This will ensure inclusion in the FAE CPE catalogs.

The Associate Director of Education Services and conference coordinators will assist in coordinating session topics, securing speakers, producing materials, and providing on-site administration. These programs are identified in advance and structured to meet the needs of the membership. FAE sponsored programs are open to all members, although the content may be targeted to a particular segment and external groups.

To properly promote your programs, conference topic descriptions and the name of the assigned conference chair must be submitted by the 1st of the month during which your brochure information is due. Fully completed brochure material is due 16 weeks prior to the date of the conference. Any information not submitted (speakers' names, bio, etc.) will be printed in the brochure as "TBA" (to be announced).

Technical sessions promotional material is also due four (4) months prior to the date of the program and must be approved by the FAE. This will ensure that the technical session is also properly promoted in *The Trusted Professional* and on the Society's website.

Committee Meeting CPE

Technical presentations at committee meetings may qualify for CPE credit upon meeting certain specified conditions as described in the guidelines for committee meeting CPE, attached as Appendix E. Committee technical sessions are not stand-alone programs. They must be held as part of a committee's regular business meetings.

Foundation for Accounting Education

GUIDELINES FOR COMMITTEE REQUEST FOR BREAKFAST OR EVENING TECHNICAL SESSION

In order for the session to qualify for Continuing Professional Education credit, the following requirements must be met.

- ◆ Programs must be three (3) CPE hours in length. A CPE credit hour is equivalent to **50 contact minutes**. Programs may be held in the morning as a breakfast technical session (BTS) or in the evening as an evening technical session (ETS).
- ◆ Breakfast technical sessions begin at 8:30am and end at 11:30am (check-in is 8:15am). Evening technical sessions begin at 5:30pm and end at 8:30pm (check-in is 5:15pm). Each session should include a 15-minute break.
- ◆ The committee chair or the designated committee member should provide the FAE staff with the announcements/advertisements for the program fourteen (14) weeks in advance of the program date. (See attached request form.) All items on the request form must be submitted completely filled out. Staff will publicize the session on the website of the NYSSCPA and in *The Trusted Professional*.
- ◆ The request form must clearly state the following:
 - Name of the Committee Contact Person
 - Date of Program
 - Name of the Committee
 - Type of Program and Time
 - Title of Program
 - Who the Program Is Designed for
 - The Objective of the Program
 - Topics to be covered or a paragraph illustrating the hot items to be covered. This is very important as it conveys to the prospective attendee the reason for attending the session.
 - The appropriate field of study.
 - All contact information for each speaker (complete name, credentials, firm name, street, city, state, zip code, phone and fax numbers, and biography).
 - Once the request form is submitted and approved, FAE will assign a course code number for the session.
- ◆ FAE has designated staff responsible for the coordination of these sessions. The staff person is **Jamie Murphey, phone: 212-719-8313; fax: 212-719-3364; e-mail address: jmurphey@nysscpa.org**.
- ◆ Speakers should be encouraged to submit their camera-ready outlines to FAE 10 business days in advance to allow ample time for reproduction. Outlines should be at least four (4) pages, but not to exceed 20 pages in length. Speakers must gain advance permission to reproduce copyrighted materials to be used as handouts.
- ◆ In order to accommodate speakers' audiovisual needs, requests should be submitted no later than ten (10) business days prior to the date of the program, to ensure availability.



Committee Technical Session CPE Request Form*

[1-Hour CPE Session]

Program date: _____ **Form due date:** _____
(6 weeks prior to program date)

Committee: _____ **Contact:** _____
Phone: _____
E-mail: _____

Program Time (Start/End): _____

Title of Program: _____

Designed for:

Objective: _____

Topics: (1) _____
(2) _____
(3) _____

Please provide on a separate sheet of paper a brief course description of the topics to be discussed.

Field of Study: (Only one should be checked off)

- | | | |
|-------------------------------------|---|---------------------------------|
| <input type="checkbox"/> Auditing | <input type="checkbox"/> Advisory Services | <input type="checkbox"/> Ethics |
| <input type="checkbox"/> Accounting | <input type="checkbox"/> Specialized Knowledge & Applications | <input type="checkbox"/> Tax |

Course level: **Basic** **Intermediate** **Advanced** **Update**

BIOGRAPHICAL INFORMATION (Please use separate sheet for additional speakers and attach a one-paragraph biography for each speaker):

Speaker's Name: _____
Professional Title/ Degree: _____
Firm: _____
Address: _____
Telephone: _____ **Fax:** _____
E-mail Address: _____

RETURN TO: Jamie Murphey, On-Line Education Coordinator, FAE, 3 Park Avenue, 18th Floor, New York, NY 10016. For questions or concerns, contact Ms. Murphey at: Phone: (212) 719-8313; Fax: (212) 719-3364; or E-mail: jmurphey@nysscpa.org.

*Please make additional copies of this form.

<p><i>FAE use only:</i></p> <p>Course Code:</p> <p>_____</p>



Committee Technical Session CPE Request Form*

Evening Technical Session (ETS); Breakfast Technical Session (BTS)

Program date: _____ **Form due date:** _____
 (14 weeks prior to program date)

Committee: _____ **Contact:** _____
Phone: _____
E-mail: _____

Program Time (Start/End): _____ **Type of Session:** ETS BTS

Title of Program: _____

Designed for:

Objective: _____

Topics: (1) _____
 (2) _____
 (3) _____

Please provide on a separate sheet of paper a brief course description of the topics to be discussed.

Field of Study: (Only one should be checked off)

- | | | |
|-------------------------------------|---|---------------------------------|
| <input type="checkbox"/> Auditing | <input type="checkbox"/> Advisory Services | <input type="checkbox"/> Ethics |
| <input type="checkbox"/> Accounting | <input type="checkbox"/> Specialized Knowledge & Applications | <input type="checkbox"/> Tax |

Course level: Basic Intermediate Advanced Update

BIOGRAPHICAL INFORMATION (Please use separate sheet for additional speakers and attach a one-paragraph biography for each speaker):

Speaker's Name: _____
Professional Title/ Degree: _____
Firm: _____
Address: _____
Telephone: _____ **Fax:** _____
E-mail: _____

RETURN TO: Jamie Murphey, On-Line Education Coordinator, FAE, 3 Park Avenue, 18th Floor, New York, NY 10016. For questions or concerns, contact Ms. Murphey at: Phone: (212) 719-8313; Fax: (212) 719-3364; or E-mail: jmurphey@nyscpa.org.

*Please make additional copies of this form.

<p><i>FAE use only:</i></p> <p>Course Code:</p> <p>_____</p>

VI. PARTICIPANT MATERIAL FOR FAE CONFERENCES, EVENING/BREAKFAST TECHNICAL SESSIONS, AND COMMITTEE TECHNICAL SESSIONS

Background

Each participant who attends an FAE conference, or evening/breakfast or committee technical session (ETS) receives a conference or ETS manual. The manual contains a narrative or outline summary of each speaker's presentation along with other material that the speaker feels is appropriate. The speaker is responsible for assembling all material for the manual, and delivering it, camera-ready and timely, to the FAE conference coordinator and to the conference chairperson for review.

The guidelines that follow describe the responsibilities as a speaker for developing and submitting material for the conference, or committee or ETS manual. The conference chairperson should ensure that all speakers agree to these requirements.

Format

The two formats that are most frequently chosen are:

- 1) Outline
- 2) Narrative

The following guidelines apply to both formats:

- 1) The material you submit should generally be from four (4) to twenty (20) pages in length.
- 2) The length of the material will be influenced by the nature of the topic and the degree of detail you feel is necessary to attain the learning objectives of the program.
- 3) Do not include material that is readily available elsewhere, such as the text of Internal Revenue Code sections, unless such material is integral to the presentation.
- 4) Submit the copy in camera-ready form; FAE cannot make editorial or cosmetic changes to the material (i.e. PowerPoint presentation).

- 5) The material should generally follow the oral content of your presentation.
- 6) The copy should be typed or printed in black on plain, white unpunched 8 ½" x 11" paper.
 - a) **The use of a business letterhead is not acceptable.**
 - b) Oversized tables or figures should be reduced to fit on 8 ½" x 11" pages. Take care not to print too close to the edge of the paper, where text may become obscured in the printing or binding processes.
- 7) If tables, figures, sidebars, etc., are used, they should be properly referenced within the body of the outline or narrative.
- 8) Number the pages.
- 9) The use of examples and illustrations is strongly encouraged.
- 10) If tax forms or pro-forma schedules are included in your copy, they must be originals or clear, clean reproductions.
- 11) If forms are copied from a tax service, all wording added by the publisher should be deleted.
 - a) Figures entered onto tax forms or schedules should be typewritten.
- 12) You are responsible for obtaining and submitting to FAE written permission to use any copyrighted material. Add to the copyrighted material any required credit line in the form specified by the copyright owner.
- 13) Payment of any fee required by the copyright owner is the responsibility of the speaker.
- 14) Proofread your material to eliminate errors in:
 - a) Technical content
 - b) Typing

VII. CONFERENCE POLICIES

The following policies will directly affect the conference. They should be reviewed carefully and discussed by the committee. Exceptions to the policies may be requested, but will be granted only in unusual circumstances.

Travel Policy and Expenses

For speakers living outside the conference area, reimbursement for the following will be provided:

- 1) The lesser of coach round trip airfare, rail fare, or auto use at the prevailing IRS mileage allowance.
- 2) Transportation to and parking at the airport, if required.
- 3) The conference coordinator will make hotel room arrangements, upon request. Out-of-town speakers should arrive the night before the conference, in case of travel problems or weather conditions the day of the conference.
- 4) Dinner (reasonable dollar amount, please) the night before the conference. Coffee and danishes are available for the speakers the morning of the program, and lunch is served during the luncheon portion of the conference.

For speakers within the conference area, local travel expenses will be reimbursed.

The conference coordinator will arrange and supervise the reproduction of the conference materials included in the participant manual. Overheads and slides required for the presentation (within reason) will be reproduced by the conference coordinator. All speakers requesting reimbursement will need to complete an expense report and submit it along with receipts to the conference coordinator within two weeks of the event.

Budget

The Foundation Board of Trustees sets the budget for the conference. Any committee and conference chairs who wish for this information may submit a request to the Director of Education, during the planning stages of the conference.

Registration Fees

The member fee is available to all members of the NYS Society. A discount fee is available through the Pay-One-Price (POP) program for individuals and firms.

Complimentary registrations for the entire program are provided for speakers. A guest of a speaker or a designated committee member may audit the conference (no CPE credit awarded), subject to FAE's approval.

Co-sponsorship

Conferences may be co-sponsored with other organizations in cases where the other organization can provide resources that will *materially* improve the success of the conference. A co-sponsored conference must be sponsored under the Foundation's sponsor number and will require compliance with the standards of the New York State Board of Accountancy.

The co-sponsorship agreement provides the other organization with representation and participation in the development of the program. Under certain circumstances, the co-sponsoring organization may receive a fee for each participant attending the conference that is directly attributable to the marketing brochure distribution of the organization. Issues regarding co-sponsorship should be addressed to the Director of Education.

Conference Cancellation

The conference coordinator will monitor registration prior to the presentation date. Ten days prior to the program, if registration is less than 30 paid participants, a decision will be made by the Director of Education whether or not to hold the conference. The conference coordinator will notify the conference chairperson and the speakers of a cancellation.

CPE Credits

The primary purpose of a conference is to provide quality education for the participants. An all-day conference can qualify for up to eight (8) CPE credits (50 minutes of contact time equals one CPE credit). Certain topics presented may not qualify for credit in New York State, but may qualify in other states and meet the AICPA requirement.

Depending on technical content, some programs meet the requirements for CFP Certification, for CE Credits and PACE Credits. Once this is determined, the necessary steps will be taken to secure and advertise to potential attendees.

Speakers are entitled to credit based upon actual presentation time and will be issued a credit form by the conference coordinator. Up to two credit hours of preparation time for each credit hour of presentation time may be self-declared as well not to exceed 50% of the required CPE credits. The length of a speaker's presentation must be a minimum of 50 minutes. The New York State Mandatory Continuing Education Requirement is available upon request.