



**CFA Society
Dayton**

Program Chair and Committee Guide

(updated 26 June 2019)

Created in collaboration with Program Chairs and CFA Institute

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Objective of Program Chair/Committee

The Program Chair/Committee is responsible for all society member events, including speakers, social events, and other special events (such as Forecast Dinners and Charter Recognition Events). Programs should add member value by providing continuing education, networking, and career opportunities, as well as be a recruitment tool for new members.

Program Chair/Committee Responsibilities

- Finding speakers for society events
- Organizing event details with venue
- Managing attendee lists and gathering evaluations
- Working with other society leaders on securing sponsorships and promoting events

Work Location

Outline work location details for volunteers in this role.

- They are required to undertake their duties in a certain location (e.g., society office).
- They are required to attend board meetings at different locations.
- There are opportunities to attend society leadership meetings.
- There are opportunities to attend other local or leadership events on behalf of the society.
- If necessary, they may participate electronically rather than in person (e.g., website or newsletter support).

Qualifications

Outline qualifications for volunteers in this role.

- They are required to have held prior positions at the society.
- They are required to have prior volunteer experience at any organization.

Time Commitment

Outline the expected time commitment for this role. Be realistic in the expectations and include required meetings, time working independently, expected attendance at other society activities, and so on.

Sourcing Speakers for Your Society

Societies use a variety of resources to attract speakers to the society, including the Approved Speaker List, local connections, and industry leaders.

CFA Institute Resources

Approved Speaker List: The Approved Speaker List is an easy and effective means for your society to gain access to dynamic investment industry speakers from around the world.

Benefits of the Approved Speaker List:

High-Quality Speakers: More than 100 speakers have agreed to participate in the Approved Speaker List. All speakers are prescreened by CFA Institute for strong speaking ability, high-quality content, and interest in speaking at member societies.

Research/Marketing Tools: A searchable speaker database is available online to find speakers alphabetically, by topic, or by region. Presentation descriptions, biographical information, and travel preferences are updated regularly, and this information can easily be used to market your event.

Efficient Communication: Societies will be able to communicate directly with each speaker. Each speaker profile includes a link to his or her email address.

Control over Speaking Fees and Financial Terms: Societies can negotiate financial terms (including speaking fees and travel expense reimbursement) directly with the speaker. Speaking fee requirements, if any, will be noted on the speaker's profile page.

New Presentation Topic Areas: In addition to the Continuing Education (CE) qualified content topic areas, the Approved Speaker List includes speakers who present on career and other non-CE-related topics.

CFA Institute Webcasts (www.cfawebcasts.org): CFA Institute webcasts offer a preview of excellent speakers with whom CFA Institute has an established relationship.

CFA Institute Conference Proceedings (www.cfapubs.org): CFA Institute conference proceedings bring you presentations in an edited, easy-to-read format that lets you experience the flavor of a conference without actually being there.

Contact your Society Relations Manager if you have any questions about CFA Institute resources.

Industry Resources

Speaker Bureaus: There are numerous speaker bureaus, including Keppler, Leading Authorities, Harry Walker Agency, Lavin Agency, Keynote Speakers, Inc., and the Washington Speakers Bureau. All of them will be more than happy to send you a brochure. Only a small portion of their lists will be relevant, but it may give you ideas. The minimum charge for speakers from these bureaus is about \$10,000, unless you have a personal relationship with the speaker.

Book Authors: Authors of professional books will sometimes do speaking tours at little or no charge.

Industry Publications: Articles in industry publications can provide ideas about who is doing new and interesting work.

Local Connections

Other Societies: Look at what other societies are doing by reviewing their society websites and asking them how their speakers did. You can also search society events on My CFA using these simple steps:

1. Log in to My CFA (<https://www.cfainstitute.org/account/Pages/index.aspx>).
2. Select “Manage Account.”
3. Select “Topics & Interests.”
4. Select “Edit” next to “Societies of Interest.”
5. Choose the societies you would like to follow. The societies will show up under “Society Information and Events” on your Member Dashboard.

Your Peers: Ask committee members or others in your society what events they have attended and whether they have seen anyone they would recommend.

Nearby Universities: Partnering with a university may give you access to its faculty members as potential speakers.

Local Regulators: Consider local regulators and “financial dignitaries.” People who fall into this category, however, generally cannot commit very far out and may have a high risk of canceling.

Collaborating with Other Societies

By collaborating with nearby societies, you can often draw bigger-name speakers to your area. Your Society Relations Manager can provide contact information for nearby Program Chairs/Committees and can suggest opportunities to collaborate on joint events.

Event Planning

Event Planning Checklist

Develop Program and Budget (at least six months prior to event)

- Develop an event agenda and decide on the target audience. Consider how many speakers you want and whether there is a theme for the program.
- Determine a registration fee (if any) and deadline. Consider whether you want to charge a cancellation fee and whether you will accept walk-ins. An early-bird discount may be useful if you are uncertain of demand.
- Identify volunteers to invite speakers and plan the event.
- If you want a sponsor for the event, assign a volunteer to this task and see sponsorship tips on the Society Center programming page.

Choose Date and Location (four to six months prior to event)

- Find and reserve the venue for the event. Consider partnering with a university or sponsor for a venue to avoid room rental fees. Be aware of holidays, school closings, and other local events when you choose the event date.

Recruit Facilitator and Speaker(s) (three to six months prior to event)

- Choose the facilitator, ideally someone who is a practitioner, a member of your local society, a CFA charterholder, and a knowledgeable and engaging speaker.
- Contact the speaker(s) for your event. Be sure to address the following details and follow up in writing to confirm the terms that have been agreed upon:
 - Date, time, location
 - Speaking fee, if applicable
 - Expenses to be reimbursed (travel, lodging, meals, etc.)
 - Cancellation policy:
 - Discuss what will happen if the speaker has booked travel and the society cancels the event.
 - Discuss what will happen if the speaker confirms but later cannot attend the event.
 - Topic and length of presentation
 - Audiovisual (AV) needs
- Create and maintain an acceptance list of attendees (full names and email addresses).

Executing the Details

Two to Four Weeks prior to Event:

- Order food and beverages and arrange for a buffet/beverage table.
- Rent appropriate AV equipment and hire an AV technician.
- Contact the speaker(s) to discuss AV equipment and other presentation needs and any travel questions.
- Forward information about the presentation to the facilitator and answer any questions he or she may have about the program.
- Ask society members to serve as greeters and to help with registration.

Week of:

- Copy speaker handouts and evaluation forms for attendees.
- Send an email reminder to registered attendees.
- Work with the venue to put up directional signs guiding attendees to the room.
- Confirm with the AV technician and the caterer.

Day of:

- Place a society volunteer or signs in the building at crucial locations to guide attendees.
- Greet the facilitator and speaker(s).
- Confirm the placement of AV and other equipment and test.
- Adjust the lighting in the room and make sure the speaker and screen (if applicable) can be seen by all.
- Review the food/beverage setup with the caterer.
- Set up the registration table with name tags and a sign-in sheet.
- Place an evaluation form on every seat and have a volunteer at the door to collect the forms as people leave.

After the Event

- Keep a list of attendees for your records. Learn more about using your attendee lists to provide CE credit for attending. See the Society Center's Providing CE Credit page at <https://www.cfainstitute.org/societycenter/resources/programming/cecredit/Pages/index.aspx> to learn more.
- Send a thank-you note (gift optional) to the speaker(s) and facilitator.
- Review the evaluation results to assess the program and to gather ideas for the future.

Many societies keep a list of venues used for society events, including contacts, average costs, and any feedback from prior events.

Finding Sponsorships

Sponsorships deliver financial resources by providing access to event attendees and/or society members via your website, in print, and/or face-to-face. Before approaching companies to ask for support, an important first step is to define different opportunities, costs, and benefits. By creating this value proposition, you can clarify deliverables and benefits.

Resources to aid you in creating your own sponsorship program can be found on the Society Center at <https://www.cfainstitute.org/societycenter/resources/programming/sponsorship/Pages/index.aspx>.

Marketing Events

- Use the Event Spot checklist at the end of this document to update all event details and then send to Melissa Mawyer so that she can set up the event and schedule the invitation and all reminders. In order to allow sufficient time, please send all event information at least one month in advance of the event.
- All board members can access Constant Contact.
User name is DaytonCFA and password is Society.

Only your society administrator and the program chair should make changes to an event.

- Market to members: Include event information on the society website and in the society newsletter and send an email notice four to six weeks prior to the event. For larger events, consider sending email notices two to three months in advance as a save the date.
- Market to non-members: Seek opportunities to advertise in your community and to employers.

Using CFA Institute Content for Society Events

- CFA Institute encourages societies to use its collection of webcasts and podcasts as part of their educational programming. All webcasts and podcasts are free for members. If a (non-member) society staff member would like access to CFA Institute webcasts and podcasts, please email your Society Relations Manager to request a free Webcast Pass.
- Not all CFA Institute webcasts and podcasts contain the right to display the speaker's presentation to a group audience. Please consult ceprogram@cfainstitute.org for those webcasts and podcasts that are available for group viewing. This list is continually updated as we receive approvals from speakers.
- To view the available webcasts, you will need to ensure that the venue has an adequate internet connection. You will also need a laptop, data projector, and screen.

Continuing Education Credits

Members are often focused on attending events that provide continuing education credits. Most speakers on the Approved Speaker List are confirmed for CE credits. Societies can pre-qualify speakers for CE credits and submit credits for other designations.

Approved-Provider Program

The Approved-Provider Program enables societies to pre-qualify and advertise their own programming as eligible for CE credits and also to pre-qualify individual programs offered by third-party providers, including programs offered in partnership with or through local third-party providers. View the guidelines on the Society Center at

https://www.cfainstitute.org/societycenter/resources/programming/cecredit/Documents/enhanced_criteria.pdf. Contact [Melissa Mawyer](#) directly to have her help you with having CE qualified events added in for your members.

Other Designations

Societies can register their programs with other regulatory bodies for continuing education credits. To view a directory of approved providers, visit

http://www.cfainstitute.org/learning/continuinged/ce/provider/Pages/approved_provider_directory.aspx.

Evaluating Speakers

Speaker evaluations play an important role in determining whether you are meeting your members' needs with your programming schedule. They are also important in determining which speakers should be included in future programming initiatives and can have wider applicability in providing guidance to other societies.

You can distribute these evaluations in two formats: paper at the presentation or an electronic version emailed after the event.

Coordination with Other Society Leaders

Public Awareness

Ensure that Public Awareness chairs have appropriate event details for promotion.

Treasurer

Confirm that speaker and event costs are within budgetary guidelines. Help secure sponsorships.

Additional Resources

Society Relations Manager

Name: Leah Lindauer

Email address: leah.lindauer@cfainstitute.org

Phone: 434-951-4874

Society Operations Specialist

Name: Melissa Adams

Email address: Melissa.adams@cfainstitute.org

Phone: 434-951-5289

Checklist for EventSpot in Contant Contact

Event Basics:

When

Date:

Time:

Where

Location of event:

Contact

Society Contact and email for the event: This should always be the program chair.

Description

You are invited to join us on "Date" at the "Location" for our special guest speaker is "Name". The topic is the "Topic". Feel free to list as much information about the event here as you would like to.

(Click here for speaker information.) <<Insert link here>>

(Click here for company information.) <<insert link here>>

Registration begins at "Time" and presentation and lunch/dinner begins at "Time" in the "Room/venue". Anyone interested in investing is welcome to attend. CFAs, CFPs, and CPAs are eligible for 1-hour of continuing education credit.

If you have any questions, please contact "Program Chair name and email". RSVP by "Date".

We look forward to seeing you at the event!

Regards,

CFA Society Cayman Islands

Settings

Typically, no changes are required here. This should already be set up.

Registration

Go to the Event Landing Page and click on Edit.

Event Body Block

Review and change to the current meeting details.

Add the hyperlinks here (for speaker bio and company website)

Event Registration Block

This should be a new link to this event.

Event Location Block

Update this information with the current meeting details.

Event Body Block

Change RSVP information to: "Date"

Text Body Block

Update for new sponsor (if we have one). For now, there is no confirmed sponsor.

SAVE THE DATE information can be added. If you have upcoming events listed them below.