

Requirements for Organizing an IEA Regional Conference

This policy applies to IEA Regional Conferences. IEA Regional Conferences are those that are hosted by one or more Affiliates*, advertised to a “regional” audience (for example “IEA European Conference” or “IEA Latin American Conference”), and approved by the IEA Board as an official “IEA Regional Conference” under this policy. Regional conferences occur in alternate years from the IEA Global conference.

Local conferences are an option for Affiliates at any time. The name of those conferences should make it clear that it is a local Affiliate event so as not to create confusion with IEA Regional or Global conferences. Local conferences are those primarily aimed at the Affiliate’s members.

Approval of Conference Site, Organizer, and Timeframe

Board Approval

Regional Conferences require IEA Global Board Approval of the organizers, the date and the site.

Process for gaining approval:

- Applications to host an IEA Regional conference must be submitted to the IEA office during the four-month application period from October 1 through January 31 of the year preceding the proposed conference. All applications received during such period will be reviewed by the IEA Staff and Board of Directors, and conference hosts for the year will be selected in accordance with this policy.
- The Regional Conference application form may be found here:
<https://forms.gle/WKLQVxtLt6EcnXbE7>
Any questions about the application form or process may be discussed with the IEA Staff.
- The IEA Staff and the Events Committee of the IEA Board will review all proposals received during the application period. They may seek clarifying or additional information with respect to the planned conference or host team, or information concerning the host Affiliate’s flexibility with respect to timing or other aspects of the conference.
- The Events Committee will select up to three applications for the year and will propose a recommended calendar of Regional Conference events for the year, identifying Affiliate hosts and conference locations (including whether a conference will be online or conducted in other than English). This calendar will then be submitted to the IEA Board for approval. The Board will approve this calendar by no later than April 30. Successful applicants will be notified promptly.
- The calendar of Regional Conference events for the following year will be announced at the IEA Global Conference. Successful applicants will be asked to produce graphics and descriptions with the conference name, theme and location in time for use at the Global conference.

* Wherever the term “Affiliate” or “Affiliates” is used in this policy it also refers to and includes IEA US Chapters.

Criteria that will be considered during this process:

- The Affiliate sponsor(s) level of adherence to the Affiliate requirements and duties, including payment of annual fees, annual operations reporting, and the experience and reporting in connection with any prior regional conferences sponsored by the Affiliate,
- The maturity and experience of the conference planning team,
- Whether the planning team includes an adequate number of people (not a one or two-person operation),
- The planning team structure and biographies of team members reflecting experience in event planning, marketing and budgeting,
- Conference format – in-person, virtual or a hybrid,
- Location (country/city/venue if known) or online platform to be used,
- Fairness and variety in terms of providing opportunities for all Affiliates to have the opportunity to host a Regional Conference,
- Suggested dates, locations and formats and how they relate to other anticipated IEA Regional Conferences and IEA Global events proposed for the year with a goal of creating an interesting, varied, balanced and well-spaced calendar of opportunities for IEA and Affiliate members and Enneagram communities to gather worldwide, and
- Languages and translation services to be offered.

The IEA Board can approve no more than three Regional Conferences per year, no more than two of which are in-person gatherings. Regional Conferences will be spaced several months apart in order to make it possible for attendees to go to multiple conferences. Generally only one in-person conference per region per year will be approved but the Events Committee may, in its discretion, determine to waive this requirement if the timing, location and format of proposed conferences would allow for the creation of a balanced calendar of events.

Regions for in-person conferences:

- Europe & Russia
- Middle East & Africa (including Turkey)
- South & Central America (including Mexico)
- US, Canada and North America (other than Mexico)
- Asia & Oceania

Any of the above regions can collaborate for virtual, language-based conferences.

Conference Branding

Conference Name

The Conference name and promotional materials must state explicitly the region or the language and the affiliation with the IEA in a way that makes clear that it is an IEA-Endorsed Regional Conference and does not cause confusion with Global IEA Conferences or local Conferences.

Conference Logo

A Conference Logo and theme are created by the Conference organizers. The official IEA-Endorsed Regional Conference Logo and Branding Requirements will be provided to the conference organizers upon approval of the conference by the IEA Board. All material and literature pertaining to the regional conference must include the official IEA Endorsed Regional Conference logo on an equal co-branding footing with the Conference Logo. This includes all promotional materials and communications, pamphlets, displays, advertising, and other information, whether in print or online (including websites, electronic communications, and social media postings). IEA Branding Requirements must be adhered to for the conference to be promoted by the IEA as an official IEA Endorsed Regional Conference. It is strongly recommended that the proposed conference name, logo, and presentation formats be shared with and approved by the IEA Staff prior to their printing or use to ensure that these requirements are satisfied.

Relationship with the IEA during the Organization of the Conference

There must be regular contact with the IEA Staff during Conference preparation. The IEA can provide support, consultation and guidance during the process and make sure these Requirements are being followed. The Regional Conference Guidelines provide a wealth of “best practices” information developed by prior global and regional conference organizers and should be consulted for guidance on necessary steps and considerations for a successful conference.

Timeline and Significant Milestones

A timeline of significant milestones must be developed and timely updates on progress with respect to these milestones must be communicated to the IEA Staff. Significant milestones to be addressed include registration details, call for presenters and presenter selection, and significant information and details about the location and/or online platform.

IEA Promotions and IEA NinePoints

The conference will be announced and promoted through IEA communication channels (including e-blasts to the full IEA database and through social media posts) and on IEA NinePoints. The IEA will announce a call for proposals and deadline for submissions at least once and will promote the Regional Conference multiple times for free to all global IEA members through email, website and social media channels. Conference organizers must provide information, graphics, and other promotional materials to the IEA administrative staff in a timely way and cooperate with such staff to schedule e-blasts and posts.

IEA Global Scholarships

The IEA may provide funds for scholarships to attend the Regional Conference, depending on the availability of funds. Awards of available scholarship money from the IEA will be managed by the conference organizers within parameters established by the IEA Board.

Profits, Financial Responsibility and Post-Conference Reporting

- 15% of profits accrued from each regional conference are payable to the IEA with 5% (or one-third of the total) being added to the IEA dedicated Scholarship Fund.
- Regional conference organizers are responsible for all logistics and event planning in connection with the conference and for handling all registrations and payments unless specific arrangements are made in advance with the IEA staff for additional assistance. If such services are requested or provided, there may be additional administrative fees charged or the profit-sharing percentage may be increased.
- The IEA is not responsible for any costs incurred by the Affiliate or conference organizers in connection with the event.
- A final report on the regional conference must be provided to the IEA within 60 days following the conference. You may download the [Post Conference Report Form](#). This report will include information about event attendance, any scholarships granted with IEA-provided funds and an accounting of the financial results of the conference, including the amount to be remitted to the IEA.

Conference tickets for IEA

- The Affiliate should offer 2 free conference tickets to the IEA Board/Staff. If representatives from the IEA Board/Staff are able to attend the conference, they should be provided an opportunity to speak at the conference about the IEA.
- There should be a discounted price for IEA Global members as well as Affiliate members.
- If possible, all presenters should be given a discounted conference registration price.

Cancellations and changes

- In the event of major forces such as pandemics, political hostilities or international travel disruptions, a conference may be canceled, or the format of the conference can be changed from face-to-face to online.
- If significant milestones on the Conference Guidelines are not met during the six months leading up to the conference, the organizers and the IEA staff will discuss what remedial steps must be taken and whether the conference can continue to go forward as planned or must be cancelled, revised, or rescheduled.
- In the event of any cancellation, rescheduling or significant change, clear and timely information must be provided to all registrants and generally on the conference website, along with information about the refund procedure.
- In case of cancellation or significant change, IEA Global is not responsible for any cancellation fees or any other cost incurred by the Affiliate or organizers.

Presenter Selection

Keynote/Endnote speakers:

- In choosing speakers it is important to recognize that this is a *Regional* Conference.
- The speakers should have significant experience and presence in the Enneagram or related field.
- It is important to be sensitive to and ensure that personal and official interests are not mixed, even if only in appearance.

Standard Presenters (non-keynote/endnote):

- Make sure that local or regional presenters are not only, nor mainly, board members of the sponsoring Affiliate(s)
- Make every effort to encourage participation and balance the proportion of presenters to include representation from multiple schools, organizations, etc. in the region, not just those represented by the boards of the sponsoring Affiliate(s).
- A maximum of 2 presenters may be invited to speak without participating in the open selection process described below. These may be presenters who, due to their international recognition, can help promote the event. During the advertising campaign, these presenters should be identified as invited speakers.

Presenter Selection Process:

- There should be an open “call for proposals” using several channels such as Global IEA e-blast, sponsoring Affiliate website, emails, Facebook, Instagram, and other social media posts.
- It is important that it be very clear as to what is required of presenters. The selection process and period, the duration and form of the presentation and other presenter/presentation requirements must be clearly described in the application form.
- Selection criteria should be open, consistent, clear and transparent.
- Preference should be given to IEA Accredited Professionals through the use of bonus points or other mechanism in the selection process.
- In addition, priority should be given to presenters from the conference region over presenters from other regions.
- All presenters must be members of global IEA. An exception may be made for keynote and/or endnote speakers or panel members from related fields asked to participate in particular sessions.

Local / Regional / International Participation:

- Every attempt should be made to include members from other countries in the region on the Selection Committee and not just people from the hosting country/area.
- It is important to remember that just as this is not a local or country conference, it is also not a Global conference and it is important to create a space for local/regional people to participate and present, keeping in mind that an important part of the conference is to support and strengthen regional talent.
- If the conference is conducted primarily in English, consideration should be given to translation into the native language(s) of the region, particularly if English is not widely spoken. If the conference is conducted primarily in a language other than English, translation services to English should be provided. Translation services should be discussed with the IEA staff to determine whether any support is possible.