



International Zoo Educators Association Guidelines for Bid Submission to Host a Conference

The International Zoo Educators Association (IZEA) asks that you use the following guidelines for preparing a bid to host an IZEA Conference. Remember, you are preparing a bid to host the Conference of the International Zoo Educators Association; as such, all aspects of the Conference will be under the auspices of the IZEA Board of Directors and their designees. These guidelines outline the minimal components that are required in an appropriate bid to host a Conference; the inclusion of additional information that will allow the IZEA Board of Directors to make a more informed decision is strongly encouraged. This detailed document was designed to facilitate the preparation of complete and successful bids. It is advantageous to all IZEA members that bid proposals make use of our previous experience and to address as many important issues as early in the Conference-development process as is possible.

Bids should be submitted to the IZEA President at least one month prior to the IZEA Board meeting that occurs at the Conference two years prior to the bid year (e.g., August, 2012 for the 2014 Conference). Submitted bids will be discussed and the successful bid selected at the Board meeting that occurs immediately before the opening of the Conference. Representatives of the group that prepared the bid are expected to make a presentation in support of their bid at the Board meeting. The presentation package may include both audiovisual materials and handouts containing any information that was not included in the official bid document. The representative of the group that submitted the successful bid will be expected to make a brief presentation describing plans for the Conference to the IZEA membership in the General Assembly on the last day of the Conferences at which the bid was accepted and that immediately precedes the Conference to be hosted.

Questions concerning the bid process and should be directed to the:

IZEA President, Ms. Kathy Lehnhardt (kathy.lehnhardt@disney.com)

IZEA President Elect (Vice President), Ms. Rachel Lowry (RLowry@zoo.org.au)

IZEA Secretary/Treasurer, Mr. Tomas Hajnys (education@zoodk.cz)

I. Provide general information concerning the location and attractions of the Conference City and/or Country

- A. Provide information about the general site of the meeting (e.g., capital city; regional city; self-contained conference facility, local history, etc.).
- B. Provide detailed information about access to the location of the Conference, including:
 - Name of the most convenient international airport

- Names of airlines and numbers of flights that serve that airport
 - Distance, travel times, and available modes of transportation from the airport to the Conference venue
 - Alternative airports, train stations, bus stations, etc. that can be used to get to the Conference venue
 - Necessities and procedures for obtaining visas
 - Current health and/or safety risks associated with the host city/country
- C. Provide basic information concerning tourism opportunities for conference attendees and/or their guests

II. Identify the Local Organizing Committee and/or Chairperson

- A. The Local Organizing Committee and/or Chairperson is typically a member in good standing of IZEA who has previously attended IZEA Conferences. The organization of an international Conference that is likely to attract between 80-150 participants is a time-consuming process that begins more than two years prior to the Conference and does not end until at least two months after the Conference. The Local Organizing Committee and/or Chairperson must have the time available to commit to this demanding process.
- B. The Local Organizing Committee and/or Chairperson will interact directly with at least two members of the IZEA Board during all phases of Conference planning and implementation; the Treasurer, typically concerning financial matters, and the President. Other members of the IZEA Board will also be involved in the planning and implementation of specific aspects of the Conference, including the Education Program, Poster Session, Open Space Session and Conference Evaluation.
- C. If a Professional Conference Organizer (PCO) will be utilized, all relevant details concerning contracts with, payments to, and services provided by the PCO must be paid for and handled by the host facility.
- D. IZEA is an association dedicated to expanding the educational impact of zoos and aquariums worldwide. Its mission is to improve the education programs in the facilities of its members, to provide access to the latest thinking, techniques, and information in conservation education and to support excellence in animal care and welfare. The facilities that host the conferences should have a strong focus on education.

III. Provide information concerning the Local Organizing Committee

- A. In addition to identifying the Local Organizing Committee Chairperson, the bid must identify other members of a Local Organizing Committee if one is deemed necessary, discuss the division of responsibilities within the Local Organizing Committee, and identify the chairpersons of any subcommittees.
- B. IZEA Board members must be integrated into all components of the Local Organizing Committee to take advantage of their expertise and to ensure that the Conference adheres to the goals and missions of IZEA. The following IZEA Board Members would be involved with the following functions:
- The IZEA President and President-elect would be involved in the overall organization of the Conference.

- The IZEA Treasurer would be involved in all aspects of the financial management of the Conference.
- All members of the IZEA Board would be involved in the organization of the education program, including the selection of plenary speakers.

IV. Identify the proposed dates for the Conference

- A. Normally, dates in late August to October are preferred. Other dates are possible.
- B. The dates for the Conference should facilitate easy and inexpensive travel to the Conference venue (as well as can be predicted two years in advance). Scheduling Conferences around the same time of year as major national or international events (World Cup, Olympics, elections, etc.) should be avoided.
- C. The typical IZEA Conference lasts five days as described below:
 - Day One: Board meeting,
 - Day Two: Board meeting, Afternoon Registration and Opening Reception
 - Day Three: Keynote Speaker, Presentation Sessions, and Silent Auction
 - Day Four: Presentation Sessions and Silent Auction
 - Day Five: Poster Session, Presentation Sessions, and Silent Auction
 - Day Six: Open Space Sessions, General Assembly and Finale Dinner.
- D. Social components of the program (field trips, receptions, tours, etc.) can, and should, be included on days two through six.

V. Provide a description of the venue and the physical facilities

A. Provide the following:

1. Name, address, and website of the venue(s) and detailed information concerning the facilities available for:
 - Presentation sessions (IZEA typically requires space for 2-3 concurrent sessions, allowing space for 50-80 people in each session)
 - Plenaries (the room used for plenary addresses and the General Assembly) should be large enough to accommodate ALL Conference registrants, about 150.
 - Smaller sessions
 - Poster sessions
 - Silent auction
 - Opening Receptions
 - Meeting rooms for committees, the Board of IZEA, and other groups
 - Space and equipment to check presentations
 - Audio Visual, including computers, projectors, and projector screens, and technical support
2. Services available at the Conference venue(s):
 - Registration and Setup, including on-site registration
 - Internet access
 - Business center
 - Security

- Transportation
 - Guides/Docents/Ushers
 - Drinking water
 - Storage of materials
 - Tourist activities
 - Accommodations booking
3. Catering Services
- Opening reception
 - Morning breaks
 - Lunches (optional or included)
 - Afternoon breaks
 - Evening receptions
 - Closing banquet
 - If dinners are not included as part of the Conference agenda, there must be available locations near the convention centers or hotels for dinner.

VI. Provide basic information concerning the program, and the abstract submission and review process

- A. The Local Organizing Committee and /or Chairperson must present a concise statement/phrase/theme that will serve as the focus of the Conference. This statement or theme should emphasize the educational strengths of the host country/institution.
- B. The Review Committee should be of appropriate size, experience, and diversity to provide all attendees with a program that is intellectually stimulating and enriching. The Review Committee will include the Conference host and IZEA Executive Officers from the Board. The abstract submission deadline must be no sooner than 9 months prior to the Conference. It is important to note that a large number of abstracts are likely to be submitted (usually around 40) and the Review Committee must be large enough to thoroughly review these abstracts in a very timely fashion (less than 3 months will be available to review abstracts and construct the program, and consider that the majority of abstracts will arrive one week prior to the deadline).
- C. The Local Organizing Committee Chairperson must present a basic description of the system(s) that will be employed to facilitate abstract submission and participant registration. **It is unlikely that a bid that proposed to utilize a non-internet-based abstract submission/registration method would be accepted.**
- D. All PowerPoint submissions should be sent to the Chairperson 2 weeks prior to the Conference. The Chairperson should ensure that these large documents are sent to a safe e-mail inbox. Otherwise, all participants should bring their PowerPoint presentations with them on a jump/flash/USB drive and download prior to the day of their presentation. In order to facilitate a timely and smooth presentation session, PowerPoints should be previewed prior to being presented.

VII. Provide comprehensive budget information

A. Construct a budget for the Conference, based on a specified total number of attendees (paying and non-paying) that includes estimates of all revenues and all expenses for the Conference. This specified number of attendees should represent both 1) a realistic estimate of the number of attendees and 2) the approximate number of attendees that will generate a balanced budget. The budget should be reviewed by the Executive Board at 1 year from conference and then again at 3 months from conference dates. **Bids that include budgets in which total expenses exceed total revenues will not be considered.**

B. Estimated revenues should include:

- Registration fees for paying participants and guests
- Donations
- Sponsorships
- Credit card payment supplements
- Optional item sales
 - Banquet tickets
 - T-shirts
 - CDs
 - Extra tote bags
 - Shuttle service
 - Tours
 - Other food and beverage (lunches (if optional), dinner at the zoo, etc.)

B. Estimated expenses should include:

- Venue rental fees
 - Convention Center Facilities (rooms, exhibit halls, etc.)
 - Audio Visual equipment and services
 - Administrative support
 - Support services (security, ushers, etc.)
 - Conference catering costs
 - Drinking water
 - Opening reception
 - Morning breaks
 - Lunches (optional or included)
 - Afternoon breaks
 - Evening receptions
 - Banquet
 - Other social functions (transportation to facility visits or tours)
- Conference organizer costs (Professional Conference Organizer or Volunteer Organizer)
 - Office staff
 - Office supplies (Nametags, CDs, etc.)
 - Communication (equipment and services)

- Website establishment and maintenance (including registration and abstract submission)
- Advertisement
- Tote bags and other commemorative items
- Administrative fees
 - Banking fees
 - Credit card fees
- Transportation costs
 - Airport shuttles
 - Hotel to Conference shuttles
 - Any transportation required during the conference such as to local zoos
- Plenary speakers’ travel and honoraria
- Contingencies
 - 10% of estimated expenses

D. Registration fees for participants and guests should be calculated according to the following matrices: You may want to consider offering a daily registration for local educators. If you allow guests to register, you must decide what the registration provides. Also, consider, if they do not attend the presentations of the conference, are there local activities for them to do while the conference is in session?

- Divide the total sum of all expenses by the targeted number of paying attendees. This will give you a number (X) that you will set as the Early Bird fee for Full Members (the **Base Registration Fee**). The rest of the registration fees will be determined according to the formulas in the table below:

Registration Fee Matrix

	Early Bird Registration	Late Registration
Participant type		
Member	X = Base Registration Fee	1.2X
Non-member	1.2X	1.4X
Daily	The cost of that day	1.5 (The cost of that day)
Guest	0.4X	0.5X

This table below contains the approximate proportions of **total** participants that are likely to register in each of the categories, at each of the time points. Use this table to make certain that your proposed **Base Registration Fee** will allow you to cover all expenses. You must identify and justify all adjustments that you make to any of the parameters in either table (you are

advised to discuss any adjustments with the IZEA President during the early phases of the bid development process).

Registration Proportion Matrix

	Early Bird Registration	On Time Registration	Late Registration	On-site Registration
Participant type				
Full member	39%	17%	12%	<1%
Full nonmember	9%	4%	1%	<1%
Daily (price was same regardless of when registered)	4%	9%	5%	<1%
Guest	<1%	<1%	<1%	<1%

VIII. Provide a timeline for when income and expenses are going to occur

- A. The Local Organizing Committee Chairperson must prepare a timeline that shows when income is going to be generated and when expenses will have to be paid. For example, if the Early Bird registration deadline is 1 month prior to the Conference, an estimate of income at that time point must be provided. Additionally, if venue and catering deposits are due at the time of contract signing and/or nine months prior to the event, then the due dates for these payments must also be specified.
- B. The Early Bird registration deadline can precede the abstract submission deadline. These two events have coincided with one another, but they are not required to do so.
- C. This timeline should include the dates upon which financial reports will be submitted to the IZEA Treasurer. Preliminary financial reports must be submitted 12, 6, and 1 months prior to the Conference. A final financial report must be submitted no later than 2 months after the Conference.

IX. Provide evidence of financial and legal sponsorship

- A. Financial and legal sponsorship or backing from a legal entity (e.g., municipal government, university, agency of national government, legally registered organization) with adequate financial assets to act as a financial guarantor for the Local Organizing Committee’s activities is required. A signed, original letter on official letterhead from these entities, indicating their sponsorship, must be provided.

X. Provide a plan that includes innovative techniques to encourage participation by IZEA members with limited financial means

- A. The Local Organizing Committee Chairperson should present innovative ideas that are focused on increasing participation at the Conference by IZEA members that have

limited financial resources. This may include applying for IZE Grants Program, identifying individual supporters, or other creative ways to fund such participants.

XI. Provide information concerning options for accommodations

- A. The Local Organizing Committee Chairperson must provide information concerning the range of accommodations available for Conference participants and the mechanisms that will be used to facilitate Conference attendees finding and renting appropriate accommodations. Where possible, special 'Conference rates' should be negotiated, especially if a 'Conference Headquarters Hotel' is to be utilized. These rates should be valid for the period from at least two days prior to the Conference until two days after the Conference, with 4-5 days being ideal.
- B. Accommodation options should include a full range of inexpensive, moderately-priced, and expensive choices (from camping sites to youth hostels to guest houses to five-star hotels). These options should be posted on the registration website for participants to review and select.
- C. There are a number of mechanisms that can be used to match Conference attendees with their desired accommodations. Professional Conference Organizers typically include arrangements for accommodations in their portfolio of services. Housing services or tourism services currently operating in the Conference city are often convenient, efficient, and relatively inexpensive ways for the Local Organizing Committee Chairperson to handle accommodations.
- D. Describe transportation systems that will be available to get Conference attendees between their accommodations and the Conference venue.

XII. Provide information concerning the cost and variety of food

- A. A general estimate of the cost of budget dining for the length of the Conference must be included. If continental breakfasts and/or lunches are included in the registration fee, then this should be noted.
- B. Should provide special dietary options for participants that have special meal requirements / religious requirements.

XIII. Additional information that may be useful as you are developing your bid

- A. A printed "evaluation and comments" form must be included at the end of the conference so that participants can comment on the organization of the Conference. IZEA will assist in the development of the template for this form.
- B. It is important to state explicitly that the IZEA Board considers each bid in great detail. Two of the most important criteria used to evaluate bids are the COSTS to the attendees to participate in the Conference and the probability that an efficient, comfortable, safe, and professional meeting can be organized. These two criteria will sometimes be in conflict with one another. It is impossible to say which of these two criteria is the most important. A Conference that is inexpensive for attendees, but also fraught with organizational difficulties, is unlikely to be a 'good deal' for participants. Conferences that involve the services of a Professional Conference Organizer are

typically more expensive than Conferences that do not involve the services of such a group, but they also may be better organized. Slightly higher registration fees that translate into significantly better services may be a good value for Conference participants. Carefully evaluate the relative costs and benefits of paying for such services.

- D. All conference venues must ensure facilities are accessible to participants with disabilities.
- E. Please state if there will be insurance protecting all attendees during the conference, especially at outings.
- F. IZEA is an environmentally friendly organization. The conference should be managed with the best environmental practices possible (e.g. providing water refill station instead of bottled water) and must be carbon-neutral. Carbon offsets should be discussed with the IZEA Board to ensure feasibility.

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