

# International Society for Business Education

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## *Conference Planning Manual*

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## Foreword

La Societe Internationale pour l'Enseignement Commercial--The International Society for Business Education is a unique International Network of individuals, business and organizations (from different language and cultural backgrounds) which seeks to expand knowledge, understanding and contacts at the national and international levels in the area of education and training for business.

Each year SIEC-ISBE holds an International Annual Conference. The Executive Committee of SIEC-ISBE delegates the major responsibility for planning the Conference to the SIEC-ISBE National Chapter in the host country. Ultimately, however, the responsibility for the International Conference rests with the SIEC-ISBE Executive Committee; it is vital, therefore, that the Conference Planning Committee in the host country should follow the guidelines described in this Manual. ***Any major deviation from the procedures set out in the Manual should be immediately brought to the attention of the International President and General Secretary of SIEC-ISBE.***

The Conferences are designated in numerical sequence: *The \_\_\_ International Conference of SIEC-ISBE*; it is hosted by one of the National Chapters of the International Society for Business Education.

The first step for a National Chapter requesting to host an International Annual Conference is to submit a bid to the SIEC-ISBE Executive Committee. The form for this bid is found in the Appendix 1 of this manual. This bid is to be submitted to the Executive Committee at least two years before the date of the planned conference.

## Conference Planning Committee

1. SIEC-ISBE Executive Committee approved this Conference Planning Manual to set the policy under which the host country organizes the conference.
2. The host country shall appoint a Conference Planning Committee to advise the SIEC-ISBE Executive Committee regarding all details of the conference.
3. It is recommended that the initial committee be small (4 – 6 members). The Conference Planning Committee can create sub-committees to carry out the numerous tasks.
4. The Conference Chairperson is responsible for all communications with the Executive Committee, newsletter editor, and the webmaster.
5. A committee structure should be identified which lists positions and responsibilities.

Example:

**Chairperson:** Responsible for conference

**Conference Secretary:** Responsible for promotion, publicity, printing/mailings, registration, accommodations

**Conference Treasurer:** Responsible for budget, finances, accounting, and billing

**Program:** Responsible for program format, speakers, facilities, and coordination with the Professional Development Committee through the Conference Chair

**Social:** Responsible for entertainment, recreation, tours, meals, and refreshment breaks

**Accompanying Persons:** Responsible for the Accompanying Persons program

6. Each member of the committee should be provided with a complete list of all committee members' duties to eliminate duplication, omission, and conflict.
7. The Conference Chairperson will handle all scheduling of the SIEC activities with the appropriate member of the Executive Committee. It is the responsibility of the Conference Chair to communicate with the appropriate member of the Executive Committee.
  - a. General Secretary: Coordination of meetings for the Assembly of Delegates, Executive Committee, Board, and Professional Development Committee.
  - b. Professional Development Committee Chair: Pedagogical Sessions and any Networking Activities

## **Section I: Budget and Finance**

1. It is expected that each conference will be financially self-sustaining. Profits or losses are the responsibility of the host chapter. The conference is expected to be self-sustaining, with no funds provided from SIEC-ISBE International to support the conference.
2. It is vital that a budget be prepared for the conference and submitted to the SIEC-ISBE Executive Committee one year prior to the conference. It is suggested that three parallel budgets be prepared for various numbers of attendees to show how the host chapter plans to handle low or high numbers of attendees. If a three-day registration option is offered, the daily cost should not be lower than the daily cost for the five-day option. If an accompanying persons program is planned, it should be self-sustaining.
3. It is mandatory that all participants pay their conference fees in the currency selected by the host country. If possible, payments should be made by credit card to facilitate the transfer of funds.
4. A course fee of ten (10) percent of the conference registration fee for each “registered delegate” will be transferred to the Permanent Office no later than October 15 of the conference year.
  - a. The International President and the General Secretary do not pay the conference registration fee and are not included in the count of “registered delegates.” It is recommended that the Conference Chair’s registration fee be complimentary. If the registration fee is waived, the Conference Chair will not be counted as a “registered delegate” for course fee calculations. All other delegates, regardless of whether or not they receive a reduced or waived conference fee, will be counted as a “registered delegate” for purposes of calculating the Course Fees.
5. The Conference Treasurer will use acceptable accounting practices/procedures, including reports. The Treasurer will submit the financial reports to the Conference Chair at the conclusion of the conference.
6. If requested, and if funds permit, SIEC-ISBE may advance some monies to allow the host country to incur expenditures prior to the conference. The respective agreement between the host chapter and SIEC-ISBE International is found in Appendix 3 of this manual.

## **Section II: Timing of the Conference**

1. The date of the conference shall be established jointly by the Conference Planning Committee and the Executive Committee of SIEC-ISBE. The date must be approved by the Executive Committee before any publicity for the conference is released.

2. Normally, the conference will last from three to five days and is typically held between 15 July and 10 August.

### **Section III: Location and Facilities**

1. The Chapter of the host country chooses the location of the conference in consultation with the SIEC-ISBE Executive Committee.
2. Factors to consider in the location selection include:
  - a. A “port of entry” city into the host country.
  - b. A university/educational institution or hotel which affords both conference and residential facilities.
  - c. Proximity of lodging accommodations to conference meeting facilities, if both are not available at one location.
  - d. Availability of transportation for delegates between residence and conference facilities.
  - e. Accessibility to major highways, airports, and local transportation facilities.
  - f. Availability of equipment and technical support at the conference facility.
  - g. Availability of educational, business, and scenic tours—during, prior, and following the conference.

### **Section IV: Theme**

1. The theme of the conference shall be established and submitted to the SIEC-ISBE Executive Committee for approval two years before the conference and before any speakers are invited.
2. The SIEC-ISBE Executive Committee will be prepared, if invited, to assist in recommending suitable program topics.
3. The main conference theme should be sufficiently general to allow the organizers to invite speakers to cover selected aspects of business education.
4. Close collaboration between the Program Committee/Conference Chair of the host country and the Professional Development Committee of SIEC-ISBE is necessary to allow for inclusion of various SIEC-ISBE activities and sessions into the program and to eliminate undue overlap.

### **Section V: Format**

1. The International President and the General Secretary will work with the Conference Chair in the planning process. It is recommended that the Conference Planning Committee of the host country consider following the format of earlier conferences.

2. Time for informal discussions between participants and for opportunities to meet colleagues from other countries is recommended between sessions.
3. In consultation with the Executive Committee, scheduled time should be provided for:
  - a. Two meetings of the Assembly of Delegates (the second of the two meetings preferably on the morning of the last full meeting day)
  - b. Two meetings of the Executive Committee
  - c. Two meetings of the Professional Development Committee (one before and one after the Pedagogical sessions)
  - d. Two meetings of the SIEC-ISBE Board
4. The Professional Development Committee provides planned sessions for the conference. The themes for these sessions and the respective responsibilities of the different Chapters will be determined during the preceding conference. The Professional Development Committee Chairperson is responsible for coordinating with the Conference Planning Committee Chairperson the arrangements for these sessions, including the scheduling of sessions.
5. The Conference Planning Committee must formally approve any additional sessions and/or activities, other than those provided by the Professional Development Committee, prior to the conference. Neither SIEC-ISBE International nor the host country will be responsible for any additional expenses involved.

## **Section VI: Speakers**

1. It is established policy of SIEC-ISBE that General Session speakers should be involved in business, government, or education in the host country.
2. The responsibility for the quality of General Session speakers rests with the host country and the Conference Planning Committee. If a replacement is needed for a speaker, it is the Conference Planning Committee's responsibility to find an appropriate replacement. The original speaker may make suggestions for a replacement, but these should only be regarded as "suggestions."
3. Major speakers should be identified approximately a year prior to the conference. It is recommended that speeches not exceed 40 minutes. Audio-visual aids and/or handouts are highly recommended. Time for questions from the audience should be built into the program. Presentation slides and handouts should be published on the SIEC-ISBE website.
4. Guest speakers should be met by a member of the committee, and where appropriate, accommodation arrangements made. Small gifts may be given to show the appreciation of the conference.
5. An information sheet (covering topic, length, audio/visual requirements, etc.) should be sent to the speakers for return to the Program Chairperson or Secretary of the Conference Planning Committee.
6. A biographical sketch of the speaker should be secured at least one month before the conference and a copy given to the person introducing the speaker.

7. Before the conference, if possible, or at the time of the conference, the Conference Planning Committee should procure a release form from each speaker for publishing the presentation delivered at the conference in the *International Journal for Business Education* and/or in the newsletter and/or in electronic form in the members-only protected area of the website.
8. Two weeks before the conference, another confirmation, including details for the presentation, should be sent to the speakers along with a copy of the program. A summary of the proceedings may be published on the website.
9. The Professional Development Committee will provide the speakers for all presentations, workshops, seminars, and networking activities. The PDC Chairperson will work directly with the Conference Chair on these arrangements.

## **Section VII: Promotion and Publicity**

1. Formal promotion of the conference begins at the conclusion of the preceding conference. It is suggested that, to promote registration, three distributions of the conference program be done:
  - a. After the original invitation, which should be submitted to the Executive Committee of SIEC-ISBE at least two years in advance of the conference, the preliminary announcement should be printed providing dates, locale, theme, etc.
  - b. A printed brochure, distributed at the preceding conference, and included in the newsletter. The brochure should include
    - i. Theme and conference topics
    - ii. Dates and locations
    - iii. Registration fee (and a summary of what is included in the fee)
    - iv. A registration form
    - v. Contact information (e-mail address, website, etc.)
2. Pre-conference advertising (brochure) covering the date, place, approximate registration fee, and theme should be available by October preceding the conference. Pre-conference advertising should be sent to the General Secretary for placement on the website and distribution to National Chapter Presidents for insertion in their Chapter's business education publication or newsletter. Chapters are expected to mail or distribute the conference information to their members as soon as possible.
3. Advertising in the form of subsequent updated information should be submitted for each newsletter during the year preceding the conference.
4. The conference affords an excellent opportunity to spotlight business education in the host country as well as in other parts of the world. Every means available should be used to obtain wide publicity. The host chapter should seek advertising opportunities outside the normal SIEC-ISBE channel.
5. For the conference itself, the Conference Committee will contact the press, radio, and television seeking to explain the nature of the event and to give notice of dates and highlights that might be newsworthy.



6. Media Releases should be issued prior to and during the conference to draw attention to newsworthy issues and events.
7. At the time of the conference, efforts should be made to interest the Media in:
  - a. Coverage of major sessions speakers
  - b. Interviews with the SIEC-ISBE International President, the Executive Committee, and the host chapter.

## **Section VIII: Registration**

1. All registration decisions must be finalized by October when the official brochure is distributed.
2. A conference program (with other materials as identified below) should be prepared and distributed to registrants when they arrive at the conference.
3. A registration area needs to be designated at the conference.
4. The time and locations (including directions) for registration should be prominently displayed in the main lobby of the hotel(s) and conference center location.
5. A registration deadline of at least four to six weeks prior to the conference date should be set.
6. Registration envelopes should be prepared in advance, filed alphabetically by country, easily accessible, containing only:
  - a. Name tags—these should be pre-typed in large bold-face type, and if possible, color-coded or flagged by county.
  - b. Meal/beverage tickets if used.
7. Registration packets containing all other conference materials should be prepared in advance and contain:
  - a. Conference program
  - b. Maps
  - c. Meal schedules
  - d. Memo pads/paper
  - e. Writing instrument
  - f. Roster of participants listed by country (identified as delegate or accompanying person)
  - g. Other materials as deemed appropriate by the host chapter
8. It is recommended that the Conference Chair receive a complimentary registration. If the Conference Chair receives a complimentary registration, the Chair will not be counted as a “registered delegate” for purposes of calculating the Course Fees. The host chapter may decide to waive or reduce the conference fee for individual committee members; however, this does not change their status as a “registered delegate.” The other members of the Conference Planning Committee are to be included as “registered delegates” for purposes of calculating course fees.

## **Section IX: Conference Office**

1. A conference office is recommended to be available during the conference. This office should be equipped with a telephone and office supplies. A computer, printer, and photocopier are considered to be highly desirable. A supply of certificate paper or the ability to create additional certificates should be available.
2. If a conference office is not available, the Executive Committee should be provided with an affordable source for printing and making copies.
3. The office or an information desk should be staffed at designated times during the conference in order to accommodate the inevitable inquires and emergencies.
4. If possible, Wi-Fi access should be available for attendees.
5. Contact information for conference organizers and other important persons should be provided to the delegates prior to the conference for ease of contact in the event of any emergencies resulting in the need to contact a participant.

## **Section X: Equipment**

1. At least four months prior to the conference, each speaker should be requested to specify any equipment required for the session.
2. The Conference Planning Committee should appoint a competent AV technician to ensure that the requisite equipment is in place and in proper working order. This person should be available as needed throughout the conference.

## **Section XI: Tours and Social Activities**

1. The host country is responsible for offering any pre- and post-conference tour options. There is an expectation of tours and social activities to be included in the conference program. Areas of interest may include:
  - a. Business and industry
  - b. Educational and cultural centers
  - c. Places of geographic, historic, and scenic importance
2. Visits should be organized well in advance of the conference.
3. Hosts should be provided in each bus or at each place visited.
4. Cost of tours should be kept as low as possible to keep the overall costs down.
5. Well planned social activities are vital to the success of any conference. The number and nature of social activities are left to the discretion of the Conference Planning Committee.

6. The host chapter has full responsibility for organizing pre- and post-conference tours. Information should be provided to the General Secretary for publication and promotional purposes following the same guidelines as the conference promotion.

## **Section XII: PDC Sessions**

1. The time and location of each session should be clearly indicated in the final program given to conference attendees. This will be coordinated with the Professional Development Committee chairperson.
2. Certificates and letters for these speakers are the responsibility of the Professional Development Committee Chairperson working with the General Secretary.
3. The conference planning committee is responsible for and gifts presented to PDC session presenters.

## **Section XIII: Protocol for Special Sessions**

1. The International President of SIEC-ISBE shall preside over the Assembly of Delegates. The Host Chapter will arrange the chairing of all other sessions.
2. The Conference Chairperson, or the designee, shall preside over the closing banquet.
3. Speeches at the closing banquet should be kept to a minimum consistent with courtesy. The International President should be given the opportunity to recognize the Conference Chair and the Conference Committee. National chapters may thank the Conference Committee privately. Other recognitions should be made at the Assembly of Delegates.

## **Section XIV: Criteria for Visits to Schools**

1. Visits should be to schools with a strong business program.
2. Visits may be to schools at any educational level. Schools should reflect the country's current educational philosophy and objectives concerning business programs.
3. Wherever possible, visits should be to schools that are in session during the time of the visit.
  - a. If not possible, a representative of the business faculty and/or the administration of the school should be available to explain the facility and programs offered.
  - b. A tour of the facility should be planned so that the business classrooms and equipment may be observed
4. Handouts about the school and its program should be available.

## **Section XV: Criteria for Visits to Enterprises or Businesses**

1. The number of participants in each group will determine the type of business and the facilities available.
2. The visit should be for a specific purpose, such as:
  - a. Instructing/training in the company for personnel
  - b. Industrial relations policy and practices
  - c. Marketing at home and overseas
3. Following the visit, there should be an opportunity to questions and discussion.
4. The members of the group should ideally be of one language group, but translation into other languages for the group may be provided by SIEC-ISBE members.
5. Company visits are normally for delegates only. Where the visits are of a general nature or of general interest and space is available, the Conference Planning Committee and the company may agree to include participation by accompanying persons.

## **Section XVI: Criteria for the Accompanying Persons Program**

1. It is the decision of the host chapter whether to offer a separate “accompanying persons” program separate from the delegates’ program.
2. If the program is offered, it will be self-sustaining. A different fee for accompanying persons is recommended if the expenses are greater for accompanying persons when compared to delegate expenses.
3. Accompanying persons are not considered “registered delegates” for purposes of calculating course fees.

## **Section XVII: Timeline for SIEC-ISBE Conference Planning**

### ***Timeline:***

#### ***24 months prior:***

- Submit Conference Bid Form to the Executive Committee so that action can be taken at the Annual Conference
- Executive Committee will discuss the bid during the Executive Committee meeting
- Once the bid is accepted, complete and sign the Agreement (Appendix 2)
- Select Conference Chairperson (may be someone other than the National President)
- Select conference site including accommodations

- Determine Conference Theme
- Provide, in writing, an overview of the preliminary plans to the Executive Committee to be shared with the Board. The report should include:
  - Contact information for the Conference Chair
  - Location
  - Theme
  - Items of Interest
  - Flyer for distribution
- Prepare and present a short invitation to be delivered at the 2<sup>nd</sup> Assembly of Delegates during the Annual Conference
- Distribute promotional materials to Conference Delegates

***20 months prior:***

- Prepare:
  - Publicity materials
  - Preliminary budget
  - Preliminary program
  - Preliminary social events
  - Preliminary accompanying persons program (if offered)

***20 months prior:***

- Determine registration fees
- Update budget
- Negotiate accommodations charges
- Negotiate fees for conference site

***18 months prior:***

- Provide, in writing, an update to the Executive Committee regarding status of planning. The report should include:
  - Preliminary budgets based upon three (3) levels of attendance
  - Preliminary program
  - Pre- and post-conference tours (if offered)
  - Approximate registration fee
  - Timetable for advertisement materials (i.e. host chapter website)
  - Brochure for distribution

***12 months prior:***

- Send publicity materials to the General Secretary for distribution
- Prepare press releases
- Contact exhibitors, if appropriate
- Prepare preliminary schedule
- Invite speakers

- Conference Chairperson attends annual SIEC-ISBE Executive Committee Meetings and presents a report, including budget, to the EC. The report should include:
  - Preliminary program
  - Pre- and post-conference tour update (if offered)
  - Registration fee
  - Brochure
  - During the EC meeting the Conference Chairperson will coordinate with
    - International President to
      - Establish dates and times of
        - Executive Committee Meetings
        - Assembly of Delegates Meetings
        - Board Meetings
        - PDC Meetings
      - If the times of the meetings must be changed to accommodate scheduling needs, the Conference Chair must notify the International President.
    - Professional Development Committee chairperson to finalize topics of sessions and the host chapter responsibilities
- Attend the National Board meeting to answer questions from the National Presidents
- Provide a formal invitation during the 2<sup>nd</sup> Assembly of Delegates that includes all information presented to the Executive Committee

### *10 months prior:*

- Arrange industry and educational visits
- Arrange special events
- Plan for alternative programs based upon a larger than or smaller than expected number of attendees

### *September 15:*

- Submit final conference brochure electronically to the General Secretary.
  - The electronic brochure should
    - Be one two-sided document with a center-fold in landscape format.
    - Contain a detailed program for delegates and accompanying persons
    - Pertinent information on fees and accommodations
    - Pre- and post-conference tours information
    - Registration information and form
    - Accommodation reservation information
    - Transportation details
    - Other information as appropriate
- Open the Conference Website with preliminary information and a brochure

### *October – December:*

- Create and distribute publicity documents including
  - Newsletter articles
  - Conference Website
- Arrange for the needs of the Executive Committee by working with the General Secretary if the EC is meeting at the conference site

### *January:*

- Conference Chairperson attends the Executive Committee meeting when the EC meeting is at the conference site, or submits a written report that includes:
  - Budget
  - Program for delegates and accompanying persons
  - Pre- and post-conference information (if offered)
  - Plans to accommodate a higher than or lower than number of attendees
  - Presenters
  - Topics
  - Tours
  - Meal functions
  - Transportation
  - Registration details
  - Facilities and equipment
  - Meeting schedules
- Confirm speakers
- Finalize conference arrangements
- Conference website should be fully functional, with registration and accommodations links

### *February:*

- Finalize program, tours, and special events

### *March:*

- Publicize the conference in the appropriate venues

### *April:*

- Confirm dates and times on the final program with the appropriate EC member

### *May:*

- Acknowledge conference registrations as they arrive
- Arrange for insurance coverage, if needed
- Arrange audio-visual equipment

### *June until Conference:*

- Send press releases
- Prepare materials for printing

- Send final information to all parties
- Confirm registration committee workers
- Arrange local media
- Determine/confirm responsible persons for each task
- Finalize all accommodations and arrangements

*During the Conference*

- Attend the Executive Committee meetings to discuss final arrangements

*Throughout the process, communicate with the General Secretary and the International President.*

*After the Conference—by 15 October:*

- Submit a written report to the Executive Committee that includes:
  - Income statement
  - Course fees (10 percent of all registered participants)
  - Suggestions for changes, improvements, etc.



## Appendix 1:

### Conference Bid Form (due at least two years prior to planned conference date)

**National Chapter:**

**Contact Information:**

National President:

Conference Chairperson:

Address:

Address:

E-mail:

E-Mail:

Telephone:

Telephone:

**Location of Proposed Conference:**

City, Country:

Closest Port of Entry Airport:

Available Transportation to Conference Site:

Potential Lodging and Estimated Cost (Single/Double/Multiple)

Are Lower Cost Options for Housing Available?

**Proposed Dates of Conference:**

**Potential Activities:**

Pre-conference Tours:

Post-conference Tours:

Business/Industry Tours:

School/University Collaboration:

Cultural Activities:

Estimated Registration Fees:

The National Chapter of \_\_\_\_\_ requests to host the SIEC-ISBE International Conference.

Signature of National Chapter President:

Date:

## Appendix 2: Agreement

la Societe Internationale pour L'Enseignement Commercial  
International Society for Business Education  
Annual International Conference

Whereas, the National Chapter of \_\_\_\_\_ has agreed to host the \_\_\_\_\_ Annual International Conference of the International Society for Business Education, the following agreement is put forth:

The National Chapter of \_\_\_\_\_ will arrange the following:

1. Accommodations for the delegates and accompanying persons.
2. Food service to include breakfast and lunch each conference day and evening meals which would be appropriate for the activities planned for the conference day. Refreshment breaks as appropriate.
3. The site of the conference.
  - a. Accommodations for approximately 200 people
  - b. A minimum of four to five (4-5) rooms to accommodate at least 30 persons
4. Tours to area business establishments within the guidelines of the theme of the Annual International Conference.
5. Tours to national cultural sites which are appropriate for the Annual International Conference.
6. Tours to area schools, colleges, and/or universities to coincide with the theme of the Annual International Conference.
7. A formal dinner and dance to take place at the closing social event
8. Conference office
9. Meeting facilities for the Executive Committee, Board, and Professional Development Committee.
  - a. Refreshments (to be paid by the EC) should be provided for the first EC meeting
  - b. Water should be available for all other meetings
10. Pre- and Post-conference tours
11. Accompanying persons program
12. Operating budget for the event

The International Society for Business Education will arrange the following:

1. Advertising for the National Chapter hosting the \_\_\_\_\_ Annual International Conference on the International Society's website.
2. All Professional Development Committee session speakers for all presentations, workshops, seminars, and networking activities.
3. Site verification.
  - a. The EC will evaluate the conference site by holding the January EC meeting on location or through prior approval from individuals who have visited the site previously.
4. Evaluate the operating budget
5. Prepare and evaluate the delegate questionnaire of the conference

Whereas, the International Society for Business Education does not share the decision-making responsibility for the method or level in which the conference expenses will be made, it will not share in any profit/loss that the National Chapter of \_\_\_\_\_ incurs due to the \_\_\_\_\_ Annual International Conference of SIEC-ISBE.

The National Chapter of \_\_\_\_\_ agrees to submit 10% of the conference registration for each "registered delegate" to the International office no later than October 15 of the conference year.

\_\_\_\_\_  
President,  
National Chapter of \_\_\_\_\_

\_\_\_\_\_  
International President,  
SIEC-ISBE

## Appendix 3

### Payment Agreement

la Societe Internationale pour L'Enseignement Commercial  
International Society for Business Education  
Annual International Conference

Whereas, the National Chapter of \_\_\_\_\_ has accepted an advance of \$ \_\_\_\_ from SIEC/ISBE international office for necessary expenditures prior to the \_\_\_\_\_ Annual International Conference of the International Society for Business Education, the National Chapter of \_\_\_\_\_ agrees to reimburse the full amount without interest to the International office no later than the scheduled opening date of the \_\_\_\_\_ annual conference.

\_\_\_\_\_  
President,  
National Chapter of \_\_\_\_\_

\_\_\_\_\_  
International President,  
SIEC-ISBE