What Makes a Chapter Program Successful?

Programs that are…

Interactive & Engaging

Applicable
What Makes a Chapter Program Successful?

Programs that are…

HOT TOPICS: 
*The Usual Suspects*

- Fraud
  - Working relationships between in-house counsel and IA departments
- Technology
  - Cybersecurity
  - Top IT Audit Risks
- Ethics
  - Applicable Case Studies
- Risk
  - Reputational Risk
OTHER HOT TOPICS

• Soft Skills
  – Interacting with Other Departments
  – Interviewing with Body Language
• Corporate Social Responsibility and Sustainability
  – Green IT Audits
• Talent Management
  – Recruit and Keep Top Level Employees
• Third Party Relationships
  – Gaining Oversight on 3rd Party Offerings

PROGRAMMING RESOURCES

• Chapter Programming Videos:
  – Chapter Programming Chair Webinar
  – 16 Tips to Improve Your Chapter Programming
• Support Documents:
  – Chapter Programming Checklist
  – Chapter Programming Toolkit
  – NASBA Toolkit
PROGRAMMING RESOURCES

• Find a Speaker:
  – Speaker Database
  – Executive Speaker Request Form
  – IIA Principal Partners and Industry Leaders

• Contact Surrounding Chapters:
  – What has worked for them?
  – What are they doing different?
  – Share speaker and topics

Discussion Questions

What is the most innovative thing your chapter does regarding programming?
A Conference Development Rock Star Was Born

- 1989: Began career in Associations planning advocacy events
- 1995 - present: Responsible for oversight, management, development and execution of continuing education programs. Began as the Director of Conferences for The IIA in July, 2015

Key accomplishments:
- Led three associations through accreditation processes which resulted in obtaining the highest level of accreditation for continuing education programs.
- Facilitated the development of competencies resulting in a new certification curriculum for long term care medicine.
- Served as a surveyor for the Accreditation Council for Continuing Medical Education to audit the quality of continuing education programs.
Logistics: Site Sourcing

- Develop a draft program outline and budget.
- Create a request for proposal outlining your needs (#of attendees, session rooms, hotel room nights, concessions – create a checklist).
- Research sites at least 18 months in advance; secure site at least 12 months in advance.
- Develop a grid of your options denoting what the property can provide on your checklist.

Logistics: Site Selection

- Ease of navigating to destination.
- Comfort of surrounding environment.
- Surrounding entertainment and meal options.
- Layout of event space.
- Hotel Rate.
Logistics: Site Selection

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<thead>
<tr>
<th>Amenity Checklist</th>
<th>Property A</th>
<th>Property B</th>
<th>Property C</th>
<th>Property D</th>
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<td>Proximity to airport</td>
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<td>Proximity to major highway</td>
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<td>Airport/transportation shuttle</td>
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<td>Entertainment options within a 5 mile radius</td>
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<td>Hotel rate</td>
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<td>Is space layout on same level</td>
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<td>How many levels for space layout</td>
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<td>F&amp;B minimum</td>
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<td>WiFi included</td>
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<td>Comp room ratio</td>
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<td>Attention ratio</td>
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<td>Additional amenities (e.g. staff room rates, comp suites, airport transfers)</td>
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Program Development: Foundation

- What is conference name/brand?
- What is the value statement/overall objective?
- What are the conference objectives?
- Who is the target audience?
Program Development: Content/Speakers

- Create the schedule
- Develop topic themes (themes should align with conference objectives).
- Identify individual sessions that align with the topic themes.
- Solicit speakers who have expertise in the topic areas (encourage engagement with audience and practical take home messages).

Program Development: Final Outline
Discussion Question

What have been your best conference experiences? Why?

Discuss strategies you could engage to create a rewarding experience for conference attendees.
Membership penetration for public seminars is **below 4%**

Less than 2%:
- Alaska
- Arkansas
- Connecticut
- Kansas
- Michigan
- Missouri
- New Jersey
- North Carolina
- Ohio
- Vermont
- West Virginia

**Weaknesses/threats**

- Erosion of reputation
- Unclear messaging
- Unclear positioning
- Internal competition
- Outdated content and gaps
- Competition
Opportunity to leverage our advantages

What are we doing?

- Revision of existing courses
- New courses under development
- Consistency in yearly schedule
- Increased frequency
- Rolling 12 month Schedule
- New Venues
- Working more closely with chapters
Benefits

• Strengthen relationship between Chapters and IIA HQ.
• Better understanding of training gaps within the IIA’s training catalog by having better communication with our chapters.
• Compliment the chapter training programs.
• Help foster local member engagement by providing post-event registrant list to chapters.
• Provide added value to Chapter members and help in the recruitment of new members.

2017 Programs

Raleigh Chapter - July 11th-13th
- Beginning Auditor Tools and Techniques
- Operational Auditing: Influencing Positive Change

Northeast Ohio Chapter August 7th-9th
- Beginning Auditor Tools and Techniques
- Data Analysis and Sampling

Puget Sound Chapter – August 15th-17th
- Beginning Auditor Tools and Techniques
- Auditor-in-Charge Tools and Techniques
2018 Partnership Programs

- Working to identify 4 chapters to partner with by end of July
- Find opportunities to compliment programs chapters already have planned
- Ability to bring our new and updated courses directly to your local area

Discussion Questions

What can we do to collaborate better, to complement rather than compete?