

CONFERENCE SPEAKER HANDBOOK

The complete guide to your responsibilities as an AICPA conference speaker

IMPORTANT CONTACT INFORMATION

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Speaker Roles and Responsibilities

Thank you for agreeing to speak at an AICPA Conference.

By accepting the speaking engagement, the speaker agrees to the following:

- To create and submit session description(s) as well as support material(s) by or before deadline date set forth by AICPA Conference Project Manager. This will include:
 - a session description for the promotional brochure for each session they are presenting; and
 - presentation and support materials for each session.

Speaker also agrees to conduct the presentation in accordance with the session description.

- To adequately prepare for the presentation by review of the session description; discussion with AICPA Conference Project Manager, as well as planning committee member(s). This is necessary to ensure a professionally conducted presentation designed to attain the stated learning objectives in the session description.
- Not to advertise or solicit business in both conference presentation and support materials.
- To present session(s) for agreed upon time as stated in the Speaker Confirmation Letter sent by AICPA Project Manager.
- To perform duties in an ethical and professional manner and to the best of **SPEAKER's** professional ability. *Ethical and professional manner includes no use of foul language and/or derogatory comments about the AICPA or the CPA profession, as well as discriminatory comments based on race, sex or religion.*
- Not to substitute any other individual to provide service without AICPA approval.
- That any materials distributed by Speaker at the session will not contain material which is not his original work or the original work of his associates or assistants without AICPA approval. Where approved, the Speaker will obtain written consent of both publisher and owner of that material to reprint and distribute.

DEVELOPING YOUR EDUCATIONAL MATERIALS

The AICPA Statement on Standards for CPE Programs requires detailed educational materials of session presentations for conferences to qualify for continuing professional education (CPE) credit.

Speakers are required to provide the following Educational Materials in an electronic format:

BIOGRAPHY

A one-page biography should be provided and will be included with the Educational Materials.

- Do not number the page of your biography.

SESSION MATERIALS - Visual Aids and Supplementary Educational Materials

If you have any co-presenters, please work together to submit one set of materials. Your session materials should include either an outline of your presentation or the presentation itself (i.e., PowerPoint file) and supplementary educational materials.

Supplementary educational materials supply the participants with up-to-date information and/or additional material that are too lengthy or complex for note taking. This may include articles, checklists, illustrative charts, tables and a bibliography of related material or any published works you plan to reference in your presentation.

There are three possible ways in which we will organize and distribute speaker materials. Your Project Manager will inform you of which of the following formats will be used:

I. Materials in a Binder

- All materials will be distributed in a Conference Binder and distributed to all attendees on-site.

II. Materials on the Web

- Your PowerPoint presentation and supplemental materials will be posted to a web site approximately one – two weeks prior to the conference

III. A combination of Materials in a Binder and Materials on the Web

Optional Sessions/Workshops

Materials for these sessions will be reproduced in a separate bound booklet. Speakers can provide up to 75 single pages of materials.

Lunch Speakers and Roundtable Discussion Facilitators

If you are facilitating a roundtable discussion or giving a lunch presentation, you will need to provide a one page bio and a one page discussion outline. Please check with your Project Manager.

Copyright Information

Please remember to obtain and provide us with written permission to reprint any previously copyrighted material (non-AICPA). We cannot obtain such permission for you.

Do's

- Submit copies of your audiovisual aids (i.e., PowerPoint file) to your Project Manager. (*Refer to the Audiovisual Information and Requirements for more information.*)
- We will provide laptops loaded with your presentation on-site. Bring a back-up of your presentation with any changes on a thumb drive or CD.

Don'ts

- **Do not number your pages.** AICPA will number the pages of your handout on the bottom center of each page in the following order: session number, hyphen, page number. (i.e., if your session is #6 in the brochure, your handouts will be numbered: 6-1, 6-2, 6-3, etc.)
- Do not submit title pages. We will provide title pages for each presentation.
- Do not include extra pages for note taking. We will provide pages for notes.
- Do not include promotional literature or order information for books, tapes and other products. If this information is included, we will remove it.

Submission Deadline:

Your educational materials are due to the Project Manager **approximately two months prior to the conference**. We must have your material in our office by the specified date. This allows time for proofreading for typographical errors and to prepare it for printing. We do not retype or edit outlines unless we feel it is necessary for quality reproduction. Printing and web design schedules are carefully planned. If we are to have sufficient time to assemble, print, and ship these materials to the conference site or load to the pre-conference Speaker Materials web site, your cooperation is essential.

Late Materials:

You are responsible for the reproduction and shipping of any materials that are not received by the deadline. Costs associated with such reproduction and shipping will not be reimbursed by the AICPA.

Providing Additional Handouts On-Site:

If you choose to provide additional handouts on site:

- All materials must be three-hole punched
- Provide enough copies for ALL attendees in your session. Contact your Project Manager for quantity
- You must coordinate shipping the materials. Contact your Project Manager for shipping information
- We will not reimburse you for reproduction or shipping expenses

Submission Instructions:

Please submit your materials to your Project Manager in one of the following formats:

1. **Via E-mail** (as an attached document) (This is the recommended format.)
2. **On a diskette** to: **Your Project Manager**
AICPA – Meetings and Conferences
Palladian I,
220 Leigh Farm Road,
Durham, NC 27707

File Formats

- If you are not using a Microsoft Office application, please convert files to Rich Text Format (.rtf).
- Be sure to indicate the filename, software application and operating system used.

NOTE: You are responsible for bringing a back-up of your presentation(s) with any changes to the conference. We will pre-load presentations that are submitted via email or on diskette.

TRAVEL POLICIES, HOTEL ARRANGEMENTS AND EXPENSE REIMBURSEMENT GUIDELINES

Please see your confirmation letter to confirm the expenses for which you will be reimbursed.

Please note: If you are a representative from a government agency, please let your conference project manager know what guidelines we need to adhere to in order to comply with your agency's ethics regulations.

AIRLINE RESERVATIONS

You will need to make your own airline reservations

- AICPA will reimburse the speaker for the amount of a non-refundable coach fare ticket. Airline ticket change fees are the responsibility of the speaker.
- You must purchase your ticket at least 21 days prior to the conference to save on cost
- If your airline ticket is over **\$500.00**, you must contact me to discuss alternative arrangements in order to be reimbursed for your travel. **Tickets purchased after 21-days prior to the conference and that are over \$500 will be subject to a maximum reimbursement of \$500 if prior written approval from your Project Manager was not received. The AICPA reserves the right to deny reimbursement for fares purchased within 7 days of the conference.**
- The cost of personal and other business stopovers will not be reimbursed unless the fare decreases.
- You must provide the original passenger receipt with your expense report.
- If the AICPA was directly billed for your airline ticket, and you decide to cancel your speaking engagement, you will be responsible for reimbursing the AICPA for the cost of your ticket.

• Use Best Travel to your Advantage!

Speakers are requested to use Best Travel, the AICPA preferred Travel Agency, to arrange their airline transportation. By using Best Travel:

- Airline tickets will be billed directly to the AICPA so you don't have to carry the cost for any length of time
- You will be able to retain your mileage awards
- You will have flexibility to incorporate other business or personal travel into your travel itinerary (at your cost).

To speak to a Best Travel agent, call the AICPA Speaker Reservation line at **800-745-6035** and Press 1.

However, if it is not feasible for you to use our Agencies, you may use your own travel agent.

▪ Use AICPA Airline Discounts

Your travel agent may take advantage of these discounts when making your travel arrangements! Effective January - December, 2008 you may call any of the airlines listed below and reference the appropriate code in order to receive airline discounts or special zone rates ranging from 2% - 15% off applicable fares:

- American Airlines 1-800-221-2255 Index #19956
- United Airlines 1-800-521-4041 Refer to Meeting ID #531SI

Consider a Saturday night stay-over

Talk to your Project Manager about this option. If you stay-over on a Saturday night, the AICPA will:

- Reimburse you for the additional room nights at the conference hotel and reimburse you for all other allowable expenses (meals, tips, etc.) up to the airfare differential.

Total additional expenses including airfare should not exceed the cost of a non-refundable coach fare airline ticket had you not stayed over Saturday night. Ask your travel representative to document your airfare with and without the Saturday night stay over and submit this documentation with your expense report.

AMTRAK TRAIN RESERVATIONS

▪ You will need to make your own reservations

- You will be reimbursed for the purchase price of a Coach Class Ticket.

- Call the AICPA Travel Services Desk at 1-866-265-1974 – (5%-10% discount)

HOTEL ARRANGEMENTS

The AICPA Meetings and Conferences Team will make your accommodations based on the information provided on your **Hotel Reservation Request Form**.

- If you plan to stay at hotel other than the conference hotel, you are requested to provide the name and phone number which will enable us to contact you during the conference if necessary.
- To guarantee your reservation, the AICPA will make your hotel reservation based on the information provided. You will be asked to provide your credit card when checking into the hotel.

Cancellation Policy: If your arrival date changes and you neglect to notify AICPA, the AICPA will be charged and you will be billed for one night's stay. Therefore, please notify us immediately if you need to change or cancel your reservation to avoid being charged.

Confirmation

We will provide you with a hotel confirmation number approximately two weeks prior to the conference.

Reservation Changes

Contact the AICPA Program Development Coordinator or Project Manager if you need to change your hotel reservations.

Speakers living within a radius of 25 miles of the conference site

It is assumed that speakers living within a radius of 25 miles of the conference site do not need hotel accommodations. Please let us know, prior to the conference, if this assumption is not correct.

EXPENSE GUIDELINES

Receipts and Documentation

- For reimbursement from the AICPA for expenses incurred as a result of participating in the conference, submit the Speaker Expense Reimbursement Form accompanied by original receipts for items in excess of \$25.00.
- Credit card receipts should bear your signature.
- Original documentation is requested in all cases. In unusual circumstances, if originals are not available, copies will be accepted.
- Expenses that are not properly documented will not be reimbursed.

Eligibility

Reimbursement policies described in this document are limited to speakers and panelists of AICPA conferences.

Guidelines

1) Reimbursement for Air Travel

- a) You must provide the original passenger receipt with your expense report.

2) Reimbursement of Funds Spent

Reimbursement will only be provided for funds actually spent. For example:

- a) Speakers will not be reimbursed for the use of frequent flyer miles.
- b) Although reimbursement will be provided for non-refundable coach fare, it will only be made if a non-refundable coach fare is utilized. If a speaker flies at a reduced rate, reimbursement will only be made for the reduced rate.

3) Reimbursement for Hotel Expenses

Speakers will be billed individually for hotel room and incidental charges and will be promptly reimbursed by the AICPA upon receipt of the **Expense Reimbursement Form**. Speakers are entitled to one night's accommodation at the conference hotel for each day you are required to be in attendance. Speakers may

also be entitled to additional nights to accommodate travel arrangements (i.e., Saturday night stays and other circumstances as warranted by your Project Manager).

4) **Out-of-Pocket Expenses**

- Out-of-pocket expenses are limited to cost of airport transfers, lodging, internet and tips.
- Meals – continental breakfast and lunch are provided at most of the AICPA conferences. Coverage of expenses **up to \$75** for meals outside of the conference will be allowed for each day that you are eligible for reimbursement. Receipts are required for all meal expenses submitted for reimbursement.
- Personal expenses such as telephone calls, valet service, laundry, entertainment, greens fees (golf), tennis fees, health club fees, movies and mini-bars will not be reimbursed.

The AICPA reserves the right to refuse reimbursement for expenses deemed unreasonable.

5) **Transportation - Automotive**

- a) **Car Service** – car service expenses are not reimbursable except under special circumstances and unless authorized in writing by your Project Manager prior to booking the reservation.
- b) **Car Rental** - Car rental expenses are not reimbursable except under special circumstances and unless authorized in advance by your Project Manager. Please note that we will be unable to reimburse for additional drivers, gasoline, tolls or parking. You may call the number listed below and reference the appropriate code in order to receive car rental discounts.
 - i) **Hertz Car Rental** – (800) 654-2240 – Refer to the CV #: 021H0015
- c) **Automobile Travel** - For automobile travel, reimbursement is at the current IRS guidelines per mile, plus tolls and parking.
- d) **Taxi** - Taxi expenses will be reimbursed with appropriate receipts. If a taxi from your home to the airport will **exceed \$75**, contact the Project Manager.

6) **Educational Material Expenses**

Expenses associated with copying handout materials, the preparation of audiovisual materials, as well as purchased handout materials (i.e., training instruments) are **not** reimbursable unless approved in advance by the Project Manager. Handouts, supplemental materials and/or copies of transparencies will be reproduced and shipped to the meeting site by the AICPA if submitted by the required deadline. After that time, speakers are responsible for the reproduction and delivery of these materials.

7) **Expenses Incurred by Your Staff, Guest or Spouse**

Expenses for spouses, guests and staff who accompany you for assistance are not reimbursable.

8) **Dining Out**

You may be reimbursed for meals that are not provided during the course of the conference (typically dinner). We reserve the right to review your dining expenses, determine the reasonableness and adjust if necessary. If you dine with other speakers:

- i) Submit your dinner charges individually;
 - ii) or if you choose to pay the entire check, please indicate the names of your dinner guests.
- b) All AICPA staff members must pay for their own meals.

Expense Reimbursement Submission Instructions

Please submit your expense reports within 90 days following the conference. If we do not receive your report within this time period, we will not be able to honor your reimbursement request. Requests for reimbursement should be accompanied by receipts, tickets, and other supporting documentation and should be sent directly to:

Your Project Manager

AICPA Meetings and Conferences Team,
Palladian I
220 Leigh Farm Road
Durham, NC 27707

TIPS FOR DELIVERING A MORE EFFECTIVE PRESENTATION

We recognize that all of you are professionals, many of whom have extensive speaking backgrounds. In order to help you prepare for your presentation and understand the expectations of our members and the AICPA conference audience, we offer the following guidelines:

- Make sure your presentation is representative of what was promoted in the program brochure. Review the session content with a conference committee member prior to preparing your material.
- If recent events or discussions with the project manager, committee liaisons or participants cause you to divert from the promised agenda, let the audience know what you are doing and why.
- Check-in with the Project Manager at the registration desk **a minimum of one (1) hour** before your presentation is scheduled.
- Plan to be in your session room early to review and test your audiovisual equipment. Coordinate a time with your Project Manager.
- Be ready to begin your presentation at the scheduled time.
- We recommend that speakers wear business attire for their presentations.
- Avoid long introductions, stories or anecdotes.
- Avoid the use of off-color jokes, sexist remarks, and racial, political or religious references. Do not use humor at the expense of any members of the audience. (*Refer to the AICPA Board Policy Statement on Discrimination and Sexual and Other Forms of Harassment in the Workplace.*)
- Be industry-member conscious, not everyone is a public practitioner. Your audience will be very diverse. Please be non-member conscious, too. You may be addressing a number of non-AICPA members.
- When participating on a panel, please coordinate with the other panel members and moderator in advance. We recommend scheduling a conference call to ensure a smooth presentation. Be aware of pace and timing, and speak within your allotted time frame. Please be sure to "dry run" your presentation prior to the conference to make sure you can cover your material and visuals completely in the time provided.
- Focus on how the participants can **APPLY** your information to their own organizations. When using examples to illustrate concepts, be sure to relate them to CPA business executives.
- Encourage audience participation whenever possible. If time permits, case studies and actual working examples can provide the greatest opportunity for learning and networking among participants in sessions.
- No commercials please! Remember your best "advertisement" is to deliver a relevant, timely presentation. The purpose of the conference is to educate participants, and a sales pitch does not qualify for CPE credit.
- When using visual aides (i.e., PowerPoint), do not "read" the presentation directly from the slides.

AUDIOVISUAL INFORMATION & REQUIREMENTS

Use visuals to reinforce important points. Keep your visuals simple, concise and visible.

Audiovisual aids supplement learning by appealing to a variety of senses and can add to the impact of your presentation. These guidelines should be used as an aid in planning your presentation. Complete the required **Required Speaker Form** to indicate your audiovisual requirements. If you have any questions concerning your audiovisual needs, please contact your Project Manager.

Consider the size of your audience

Some visual aids are excellent for small groups, but are not appropriate for larger audiences.

- Flip Charts should not be used for groups larger than 25 participants.
- Slides, Video Projectors, and Computer-Generated Images should be used for groups over 50 people.

PowerPoint and Slide Preparation

- One “concept per visual” - main concept should JUMP at audience and use bullets to summarize supporting information. Don't use full sentences.
- Use two or more simple slides rather than one complicated slide.
- Use charts and graphs rather than tables to display facts and figures. Visual comparisons can be made more quickly and easily with a graph. Tables tend to look complicated and confusing.
- “Six by six” rule: 6 - 7 words/line x 6 – 7 lines/slide
- 45 words or less per slide
- **Use only 18-48 pt font** - These seem to work best.
- **Sans serifs are more readable than serifs** - Serif fonts usually have little brackets at the end of each letter stem and mix thinner and larger line strokes (Times New Roman and Georgia are examples of serifs) and they tend to be a bit less readable as a presentation. Sans serif fonts have the same strokes, and don't have the details at the end of each stem (this page uses sans-serif fonts; some examples are Arial, Verdana, Century Gothic).
- **Limit punctuation marks**
- **Max 2 graphics per slide** - More graphics (images, charts, whatever) make the slide cluttered.
- **Screen Shots of Internet Information** – We encourage you to use screen shots of internet information or applications rather than requesting internet connections. Internet connections at conference venues are extraordinarily costly and will only be authorized for sessions where there is an explicit business need. Please discuss with your Project Manager if you feel this is necessary.

Colors

- **Contrast is key** - Usually a dark background with a light foreground (text) works best. Pastel colors don't tend to have enough contrast. Remember that the colors you use may turn out to be slightly different using a projector. Avoid using too many colors. A good idea is to use color A for the slide titles, color B for the text, and color A again (or color C) for the words you want to stick out. Don't emphasize too many words, though, otherwise it becomes counter-productive. Limit to one or two words per block of text. In any case, don't use more than three different colors throughout your presentation, and be consistent.

Some recommended color combinations are:

- Yellow on Black or Blue (yellow on black and blue is not that visual friendly)
- Orange on Black or Blue
- White on Black, Blue, Green or Red

- **Use white space** – (empty space, or margins) Leave plenty of room (margin) around each block of text.

Microphones

- Consider your speaking style when selecting the type of microphone (i.e., lectern vs. lavalier, etc.)
- If your session is being taped, you must use a microphone. Please discuss this with your Project Manager.

Laptop Computers

We request that you bring a backup of your presentation with any changes on a thumb drive or CD. We will provide laptops with your pre-loaded presentation(s). If you bring your personal laptop, please keep it with you at all times. We cannot be responsible for stolen equipment.

Data Projectors

The Hotel audiovisual staff will determine the appropriate size projector needed for your presentation. The Hotel audiovisual staff will coordinate “connecting” computers to the projector. Please arrive early to test the equipment.

QUESTIONS FROM THE AUDIENCE

Every session should include designated time for questions from the audience. Generally, the question period is scheduled at the end of the session, although some speakers prefer to take questions throughout their presentation.

Please inform your Project Manager which of the two methods you prefer for handling questions in your session:

1. Question Cards

- Question Cards work best for groups of 150 or larger.
- Question Cards are provided in the Conference Manual distributed to each attendee.
- The Moderator will assist you with Question Cards.
- When using Question Cards, we recommend that you reserve the question period for the end of your presentation. Your Project Manager will arrange for a designated individual to collect the question cards during the final five to ten minutes of your presentation, so they can be handed to you or the moderator immediately upon conclusion of your remarks.

2. Taking Questions Directly from the Floor

- It is important that you repeat each question before answering, so all attendees can hear the question.
 - This will make your answer meaningful to the entire audience.
 - This is essential if the session is being taped.

Use your Judgment when Responding to Questions

Some questions may focus on solving a specific problem of one of the participants and may not be of interest to the majority of the participants. Often, questions of this nature could be handled more effectively in a private discussion.

Be available following your presentation, either in the session room or outside in the foyer if the room is to be used for another presentation. Try to be accessible to the participants during refreshment breaks, lunches and receptions.

SUGGESTIONS FOR THE MODERATOR

A session moderator will be assigned to assist the speaker at the conference in the following regards:

- Assuring that the speaker is at the right place and at the right time.
- Introducing the speaker to the audience.
 - Unless a speaker requests otherwise, the introduction should be very brief. The speaker's biography is already included in the educational material, therefore only review his or her name, title, and one or two career highlights.
- Assuring that the speaker is aware, in advance, of the session time limits.
- Reminding the speaker, during the session, when there are 10 minutes remaining.
- If needed, collecting and sorting the question cards.
- Coordinating multiple speakers in one session.

In short, the moderator's role is to facilitate the session so that the speaker can focus his or her full attention on delivering the most effective, professional, and valuable presentation possible.

SUGGESTIONS FOR PANELISTS

For those who are serving on one or more panels during the conference, we offer the following guidelines to assist you in preparing for your session(s).

Prepare for your role on the panel

- Carefully review the outlines for all panelists and familiarize yourself with the important points the other

speakers will be covering.

- Anticipate key arguments and formulate your own ideas, opinions and reactions to those points.
- Get together (in person or by conference call) with the other panelists and moderator to determine one another's ideas and opinions, and discuss the comments you plan to make. Feel free to contact your Project Manager if you require help to arrange this.
- The panel sessions should be a lively exchange that stimulates participant discussion. It is fine for panelists to disagree. However, avoid being argumentative, making "inside jokes" or personal attacks. If you don't know the answer to a question directed at you, or you prefer not to respond, turn the question over to another panelist, even if it has been directed to you.
- Keep your responses brief to allow time for other panelists to contribute. Do not monopolize the panel.

SUGGESTIONS FOR ROUNDTABLE PRESENTERS

In the Roundtable format, subject matter experts coordinate the discussions of several tables of participants. The purposes of the sessions are to (a) give participants the opportunity to share their views and experiences on the topic and (b) allow participants to interact directly with the subject matter experts. A key Roundtable session objective is to promote maximum interaction among all participants.

Prepare for your role on the Roundtable

- Review the subject matter well in advance of the session.
- Coordinate with the other assigned Roundtable experts in advance on how the discussions will be managed. Decide in advance on the specific subject matter questions or issues that will be addressed. An effective technique is to develop a list of 5-10 key subject matter questions that all tables of participants will discuss and answer. After all tables have arrived at consensus answers to all questions, the entire group can then reconvene during the final 10-15 minutes of the session to summarize each group's views.
- The experts should guide the discussion, but avoid dominating the discussion. The expert's role at each table is to lead and balance the discussion so that all participants have an opportunity to express their views.
- The experts should try to enable everyone to speak. Asking individuals at the table "what do you think?" is a very effective way to bring views out and empower participants to freely express their views and opinions.
- Keep in mind that all views should be encouraged. Do not argue with or contradict views expressed. This will stifle the free exchange of ideas and inhibit the session's success.

THE EVALUATION PROCESS

Each conference participant receives, as part of the handout materials, an evaluation form to record his or her impression and opinion of the program, speakers and the facility, and to provide additional comments. The following rating scale is used:

5 = Excellent 4 = Very Good 3 = Good 2 = Fair 1 = Poor

Each speaker receives separate ratings for knowledge of subject matter, presentation skills, materials and relevance.

You will receive your ratings approximately two to three months after the conference date.

AUDIO RECORDINGS OF THE CONFERENCE

If we are audio recording a conference, you are asked to sign a release form permitting the recording of your presentation. We encourage you to grant the AICPA permission to record your presentation. Recording provides a valuable opportunity for participants to take your ideas and information home with them.

All recording is performed by an outside vendor, in accordance with a written agreement with the AICPA.

Depending on the vendor that is being used for the conference.

1. If the recordings are offered for sale onsite:
 - a. Sale of recordings is currently restricted to persons receiving the conference brochure and conference registrants only.
 - b. You will receive a complimentary copy of the recording of your presentation. Be sure to stop by the vendor desk to order your tape.

2. If the recordings are being posted to a web site:
 - a. Access to recordings and conference materials is currently restricted to conference registrants only.
 - b. You will receive access to the recording of your presentation and other conference presentations via a unique conference URL.. Access to these recordings and materials will be available for 1 year following the conference.

CPE CREDITS FOR SPEAKERS

Instructors, discussion leaders, or speakers who present a learning activity for the first time should receive CPE credit for actual preparation time up to two times the number of CPE credits to which participants would be entitled, in addition to the time for presentation.

For example, for learning activities in which participants could receive 8 CPE credits, instructors may receive up to 24 CPE credits (16 for preparation plus 8 for presentation). For repeat presentations, CPE credit can be claimed only if it can be demonstrated that the learning activity content was substantially changed and such change required significant additional study or research.

THE ROLE OF AICPA MEETINGS & CONFERENCES TEAM

We are here to make the AICPA Conference experience as easy as possible. Let us know what you need.

The Meetings & Conferences – Program Development Team is responsible for:

- Creating the conference by working with input from technical staff aides, committees, marketing, and Meetings & Conferences - Operations Team.
- Putting together the agenda and all other aspects of the program.
- Working with committees to contact and secure speakers and become their primary contact for brochure outline and conference manuals.
- Developing program specifications in conjunction with exhibit requirements and communicating with Meetings & Conferences - Operations Team.
- Tracking and reconciling conference revenue and expenses.

- Arranging for speaker expense payments.
- Developing new ideas for conference add-on programs.
- Compiling conference postmortems, including conference evaluations and site evaluations.

The Meetings and Conferences - Operations Team is responsible for:

- Negotiating and executing all site arrangements including contract negotiations.
- Speaker audiovisual requirements.
- All program logistics and staging.
- Session room set-up.
- Arranging all meals and meal functions.
- Compliance with Americans with Disabilities Act.

**AICPA Board Policy Statement on
Discrimination and Sexual and Other Forms of Harassment in the Workplace**
(NOTE: Being reviewed by Mike Buddendeck)

Conference speakers are reminded that the following AICPA Board Policy Statement applies not only to Institute Staff but also to all conference speakers while engaged in AICPA conference activities.

The purpose of this statement is to reaffirm the policy of the American Institute of Certified Public Accountants of condemning discrimination and sexual and other forms of harassment - which are violations of federal, state and municipal law - in the accounting workplace and the client organizations our members serve. The AICPA believes that incidents of discrimination and harassment are inexcusable and should not be tolerated in the accounting profession.

The AICPA encourages all employers in the accounting profession, regardless of size, to condemn discrimination and harassment immediately and confidentially; and take whatever action is necessary, including dismissal of personnel, to eliminate the problem. The AICPA also encourages all such employers to attempt to prevent discrimination and harassment of all kinds through the adoption of comprehensive policies and by implementing education programs to inform management and employees of their rights and obligations under such policies.

No person, either male or female, professional or administrative, should be subject to unsolicited and unwelcome verbal or physical conduct of a discriminatory or sexual nature. Such conduct could include stereotyped or demeaning remarks or gestures offensive to either gender or to racial, ethnic or religious groups. Accordingly, all professional and administrative personnel who believe they have been subjected to discrimination or harassment from other personnel or third parties should be encouraged to report such incidents or conduct to appropriate persons in the organization immediately to assure that suitable actions are taken to curtail and prevent such conduct.

In the event of substantiated discrimination or harassment by a client, customer, supplier or another employee, the organization's management should take prompt remedial action to ensure a discrimination/harassment-free workplace for the individual. Although there are limits on the ability to

influence client or supplier behavior, possible remedial steps could include immediate discussion with the client, sending a letter of objection or refusal to continue the business relationship. In any event, the message should be clear that such conduct will not be tolerated and must stop immediately. All workplace policies against discrimination and harassment should be clear that it is the obligation of every person within the organization to comply with the policies against discrimination and harassment in both practice and spirit.

The AICPA is committed to raising awareness about discrimination and sexual and other forms of harassment and its prevention in the accounting workplace through the following activities:

- Publishing articles in the *Practicing CPA* and the *Journal of Accountancy* relevant to the identification, prevention and resolution of discrimination/harassment complaints.
- Publishing guidance for firms in the *Management of an Accounting Practice Handbook* for the establishment and management of an anti-discrimination/harassment policy, including a sample of such policy.
- Presenting educational workshops that enhance awareness of such discriminatory/ harassment conduct and its prevention.