



THE INSTITUTE OF CONSERVATION



Icon Training Events Handbook

April 2021

Icon's Professional Development Team

Table of Contents

	Page
Introduction	1
Summary	
1.1 How to organise a training event: Overview	2
1.2 How to organise a training event: Timescale	3
1.3 Using the Event Brief Template	4-5
Guidance	
2. Event Specification & Requirements for Venue Based Events	6-9
3. Event Specification & Requirements for Virtual Events	10-13
4. The Event Budget	14-18
5. Publicity & Bookings	19-20
6. Preparing for the Event	21
7. Organisation on the day	22-23
8. Post event actions	24
Appendices	
Appendix 1 Event Brief Template	26-28
Appendix 2 Novice to Expert Scale	29
Appendix 3 Icon Professional Standards and Judgment & Ethics	30-32
Appendix 4 Pricing guidance	33-34
Appendix 5 Icon consent form	N/A
Appendix 6 Diversity & Inclusion guidelines	35-40

INTRODUCTION

1. Introduction

The purpose of this handbook is to enable a consistent approach on the development and delivery of Icon's training event ¹programme.

The provision of high quality, affordable and accessible training for conservators is a key strategic role for Icon <https://icon.org.uk/about-us/icon-strategy-2017-2021>

Icon's mission is to support:

- Advocacy: through influencing our partners and the public.
- Excellence: through building knowledge, high standards and valuing the profession
- Engagement: through encouraging public awareness and participation

The following values underpin all of Icon's activities:

- Work with integrity: we are open and honest and do what we believe is best for our shared cultural heritage, the public and our members.
- Be inclusive: we value diversity and ensure that opportunities are open to all those who want to care for our heritage.
- Be forward and outward-looking: we keep our eyes on the horizon and on the world around us.
- Be ambitious advocates: both for our 1organising1n and the things we believe in.
- Be collaborative and generous: we work with our members and partners to achieve the best results together.
- Uphold high standards: we value, support and promote the expertise and professionalism of our members and partners.

Icon Groups and Networks and Icon's Professional Development Team regularly organising training events² to support members professional development. Non-members are also able to benefit from this service.

This handbook has been produced by Icon's Professional Development Team (PDT) in consultation with Icon's Groups and Networks and will be regularly maintained by the PDT.

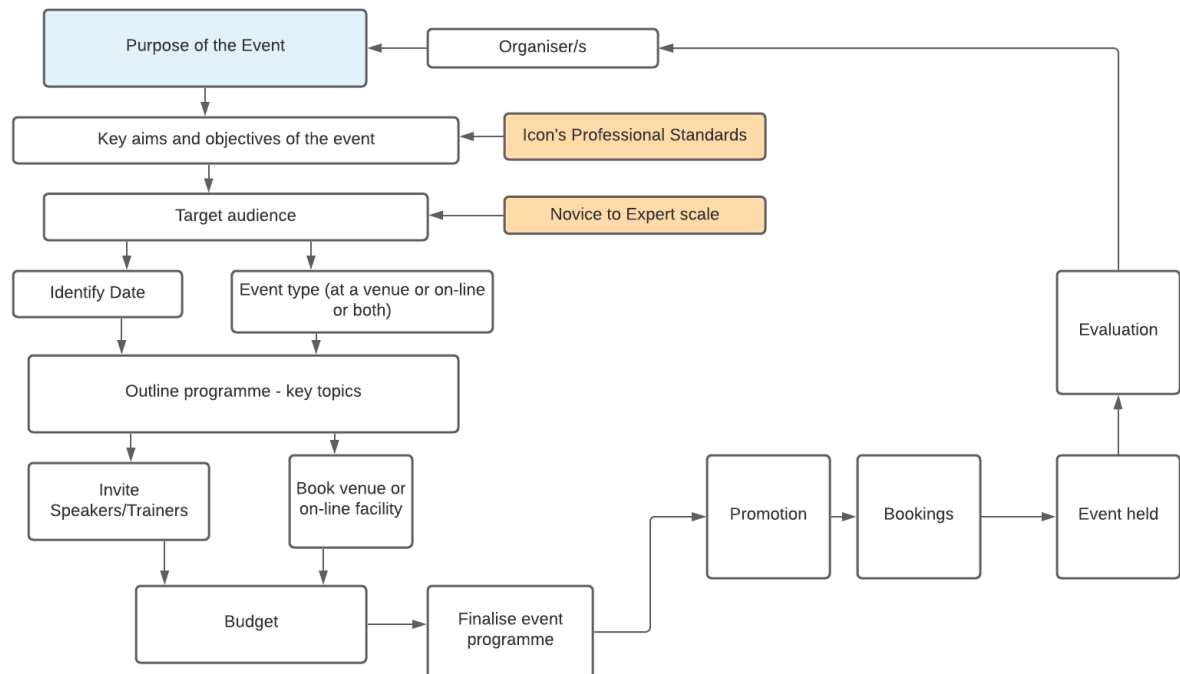
Any queries about organising an event can be sent to events@icon.org.uk

¹ This handbook covers events that are organised within the limitations of resources. A Conference Planning Handbook will be available in 2021 as guidance for larger events

² Training events cover all types of delivery e.g. held at a venue, on-line webinar

SUMMARY

1. Overview: How to organise a training event



The process of planning and organising a training event is a series of stages, all of which must be considered to ensure that everything is covered. Although the way in which you address these elements may vary you do need to be aware of the full process.

The starting point is considering what the event is designed to achieve – the **purpose of the event**.

1. Programme **aims and objectives** using Icon's Professional Standards (Appendix 3)
2. **Target audience** and their learning level using the Novice to Expert scale (Appendix 2)
3. Identify the type of event
4. Use the event brief template to plan the event outline and actions required (Appendix 1)

The method of delivery will be dependent mainly on accessibility. Organising virtual events is similar to venue-based ones, except virtual events focus on reach rather than location.

- **Venue based events** Once you have a good idea of the date and your requirements, you need to find a venue or identify an on-line facility. The outcome of this stage should be a provisional booking or agreement with the venue/on-line provider.
- **Virtual (on-line) events** Once you have a good idea of the date and your requirements, you need to identify a digital platform i.e., Zoom. Icon has a Zoom account that is available for use at no

cost to Icon Groups. Other digital providers can be used but costs will vary according to what they can provide.

Date

- Check the events being held by another Icon Groups/Networks or Icon's PD team
- Check external events that may attract the same audience

All Icon events should be environmentally friendly

Consider the environmental impact of the event by reducing the carbon footprint.

Such as:

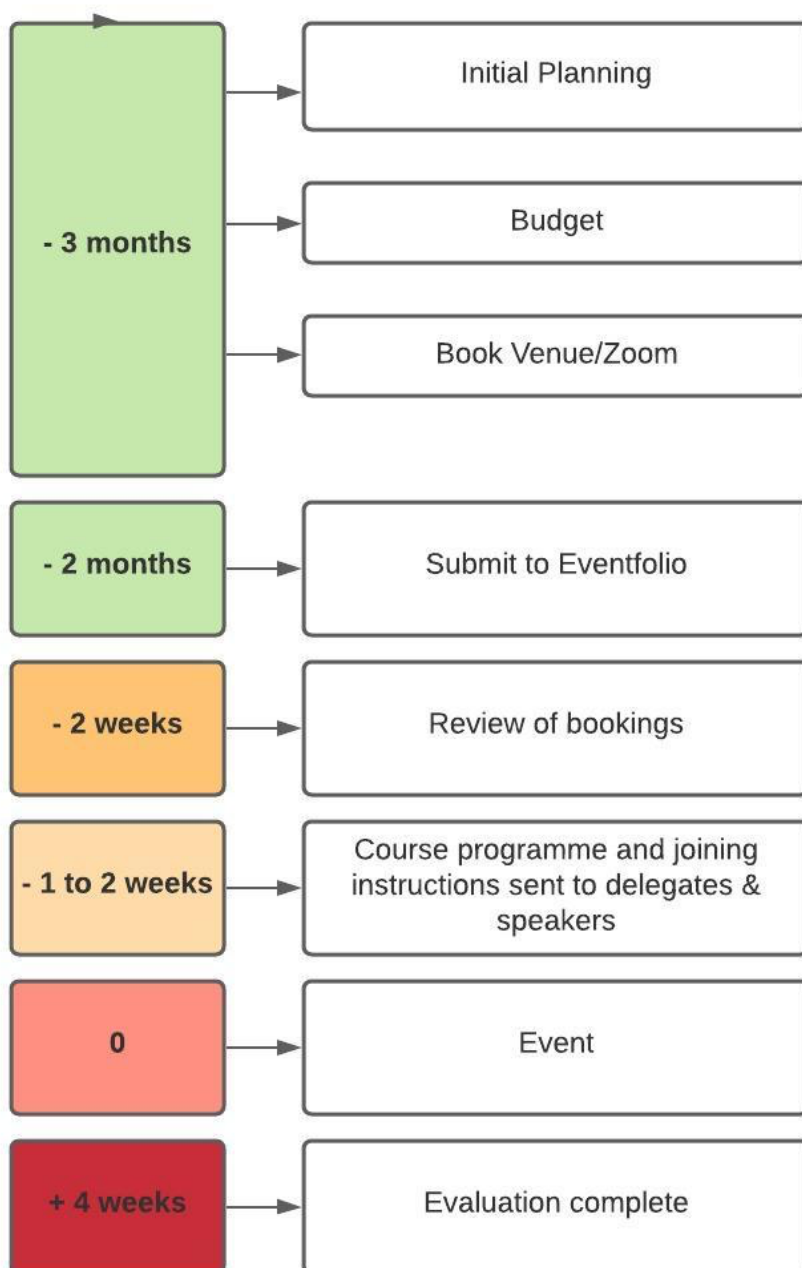
- provide a PDF online programme and delegate list, and certificates of attendance
- select a venue that is easily accessible via public transport
- provide on-line access to the event as well as at a venue
- provide vegetarian catering only and work with caterers from the start; pay attention to food packaging before the event; ensure that reusable tableware is used; and request caterers to measure cost impact, organic waste and food donation.
- no extras like bags and lanyards
- avoid all single-use plastics, from caterers to signage to plastic bags.

All Icon events must uphold diversity, inclusion and accessibility - see Appendix 6

1.2 How to organise a training event: Timescale

It is best to plan well in advance to secure a suitable venue and required speakers/trainers.

Planning at least three months in advance of the training event gives time for publicity to be successful and for each stage of the event planning to be completed.



1.3 Using the Event Brief Template

The initial planning stage is the most important part of organising your training event. The **Event Brief Template (see Appendix 1)** is a useful way to ensure you have covered everything you need. As you start planning your event you need to identify a topic or theme for the event and confirm the outcomes you would like to achieve. A good starting point is to identify:

- What topic do you want to cover?
- Who your event is for (the target audience)? Your target audience may be defined by area of work/specialism, collections they work with, the topic they want to be trained on or their level of expertise. If possible, make your programme appropriate to a variety of audiences i.e., emerging professionals and experienced conservators. The **Novice to Expert scale (Appendix 2)** outlines the different levels of expertise.
- What do they need or want to know about your topic – what are their training or development needs in this area?
- Can the topic be divided into separate headings? Which objectives come first? Will you need to achieve one objective before they can work towards another?
- Use SMART objectives to identify the training requirements
- Where is the best place to hold the event – at a venue or on-line or both?

S – Specific – Have a clear idea of what is going to be covered in the programme and by whom? Will each session be presented in the same way e.g.: series of short presentations / keynote speaker with case studies / Demonstration followed by hands on?

M – Measurable – Can you compare the learning objectives of the event to **Icon's Professional Standards (see Appendix 3)**, what are the anticipated learning outcomes, what will the delegate learn?

A – Achievable – How can you cover the subject e.g.: are there any specialist speakers on this topic? Can they practice their new knowledge during the event? [Group work / Questions and Answers / Hands on]

R – Realistic or Relevant – Is the topic meeting the training needs of your Region/Group? Can you find suitable speakers to cover the topic/s? In some cases, Icon Groups have joined forces to organise an event that addresses common training needs.

T – Time bound – How long does the event need to be to cover the programme topic/s sufficiently? How much time can you allow for each session? Variable or equal?

GUIDANCE

2. Event Specification & Requirements for Venue Based Events

Remember COVID19 safety

Check the Government advice for holding events indoors and outdoors. [Coronavirus \(COVID-19\): guidance and support – GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/coronavirus-covid-19-guidance-and-support)

2.1 The Draft Programme

At this stage you need a working draft to help you make decisions about the location, speakers, and budget. For example:

09:30	Organiser arrival and set up
10:00	Welcome and introductions
10:15	Session 1:
11:15	Coffee Break
11:30	Session 2:
12:30	Lunch
13:30	Session 3
14:30	Session 4
15:30	Coffee break
15:45	Session 5
16:45	Closing remarks and questions
17:00	Ends

- Start with the start and finish times and allocate refreshment breaks to work out how much training time is available. Remember if members are traveling a distance to attend – the start time might need to be mid-morning. Also allow for setting up time.
- Use the overall topic to break the programme down into the individual elements you wish to cover.
- Consider the type of event you want to offer -i.e., a practical workshop, case studies, seminar/lecture presentations – or a combination of them all?
- Identify speakers/trainers – you may already have some people in mind – and their presentation style may lend itself well to one delivery method than another.

Once you completed the event brief template (Appendix 1) you will also have a clearer idea on your venue requirements for the next steps.

2.2 Date

You should start thinking of possible dates as early as you can – if possible before contacting speakers, although if you have a keynote speaker or session leader then their availability may need to be considered first.

You should check that the date does not clash with any other training events or events- both internal Icon events and external events that may attract the audience you want to reach. To check for other Icon training events please consult the Events section of the Icon website.

Where possible you should try to avoid school holiday periods to ensure that the maximum number of people can attend. Also pay attention to typical popular periods around the autumn.

2.3 Speakers

Identifying good speakers/trainers and case studies is one of the most important elements of planning the training event. It can be useful to talk to other members of your Group/Network and ask for recommendations or put a call out for papers.

Group/Network training representatives can email events@icon.org.uk for advice as well as looking at previous training events organised by your Group/Network.

2.4 Delegate numbers

You need to think about how many delegates can comfortably attend the event. Events should aim to be financially viable at 70% capacity to ensure that they are able to proceed.

Numbers will vary depending on the format of the event, i.e., is it lecture / presentation based or is it practical training? It will also vary if the trainer / lead of the session needs to interact with participants, and how feasible this given the numbers involved.

2.5 Budget

Costs need to be identified for:

- Venue hire
- Speakers/Trainers fees
- Travel & Subsistence for speakers/trainers/organisers – see Icon's expenses claim form
- Printing & Promotion

2.6 Hiring a Venue

Venues are very difficult to find at short notice and a provisional booking should be made as soon as possible. You should research potential venues to identify the best options and confirm that they can meet all your requirements.

You should get a quote from the venue for the total cost of the booking

- Some venues will charge room hire and then a separate cost for catering, while others will have a rate per participant. Make sure that the quote includes all the event requirements.

You will also need to know about the venue's arrangements for making provisional bookings, confirmation requirements and cancellation fees.

It is completely acceptable to hold a training day in a workplace providing they can meet all your venue requirements. This may be available free of charge or in lieu of a place at the event. This is a favourable option as they can be the person who manages the arrangements at the venue – prior to the event and on the day.

2.7 Venue Selection

Once you have carried out your research you can decide on your venue – based on the facilities available and costs. Where you can it is worth visiting the venue but where not you should look at any brochures or websites available. You could also talk to other people who have used the venue before.

Now you need to draw up your budget before you finalise any booking with the venue to make sure the overall cost is reasonable.

It is important, when approaching potential venues, to be clear about what your requirements are.

Initially, you need to determine the general location – i.e., which city or town. This needs to be accessible to your target audience. Then should you start looking for a potential venue in that area – ideally, they should be close to a mainline railway station and have good parking or park and ride facilities available. In large cities being near to an underground, tram, metro or bus route is an advantage.

To minimize the costs of the event you may decide to not provide catering for your event. In this case you should ascertain that there is a suitable place at or near the venue to provide lunch for delegates. You should consider reserving tables for the delegates or seeing if they can pre-order their food. You must ensure delegates know that lunch will not be provided in advance and that it is helping to keep the delegate costs low.

The outline programme should help you to identify the venue requirements for your event – you should know the number and types of room(s) you will need, the maximum and minimum number of participants attending (not forgetting speakers and organisers) and the possible layout for the rooms. For most events you will need an AV/IT system for presentations so check that this is available.

You also need to check for the following:

- You will need a desk for registration.
- Computer/AV system for presentations – do you need internet access?
- Can tea and coffee be provided?
- Can water be provided for speakers and delegates?
- Where are the toilets?

- Lunch arrangements (if you are planning to include) including the ability to provide vegetarian food and to cater for other dietary requirements which may be requested.
- Facilities for disabled people (access, toilets, etc.).

If possible, tea/coffee and lunch should be provided in a separate location to the training room(s).

2.8 Booking the Venue

Once you have decided on the venue make a provisional booking as soon as possible. Some venues require a formal signed contract. Who signs this contract will be dependent on the cost of the venue (only invoices under £1,000; above this needs Icon office approval). If in doubt, email events@icon.org.uk. Do not make any final commitment before the budget has been agreed by the Group Treasurer

Make sure you formally confirm the booking with the venue to ensure all the arrangements are clear – the confirmation should state all the agreed facilities and requirements to be supplied by the venue and confirm the quoted costs/rates. Make sure that the confirmation makes it clear that the booking is being made for The Institute of Conservation and include the main Icon address 106-109 Saffron Hill, London, EC1N 8QS

If you need to pay a deposit to confirm a booking (either by invoice or to go with a booking form) then you should ask your Group Treasurer to submit through the iCompleat system. This also applies to any other invoices you receive connected with running the event

3. Event Specification & Requirements for Virtual Events

Virtual events should be planned to make sure you get the trainers/speakers to meet the training outcome. The outcome can be the same as venue-based events – organisers can achieve similar aims as noted on page 4.

When organising on-line events, you should consider:

- Digital platform – The service delivery of the event should be easy. Cloud-based software which doesn't require any downloading is a way to ensure that anyone on-the-go can tap into the event.

Zoom – This digital tool combines video/audio conferencing functionality, simple online meetings, and group messaging into one platform. Zoom meetings run on mobile and desktop devices and in hardware-equipped conference rooms. A meeting can have one host and up to 100 participants. All participants can be on video. Optional add-ons provide for larger meetings, room connector software, and webinar tools. **Icon has a Zoom account that is available to Groups and Networks free of charge.**

Organisers need to schedule their event on the Google calendar as soon as possible to ensure there are no clashes with other Icon events. Once the event is ready to **add to the booking system** [Eventfolio](#) upload. IMPORTANT TO NOTE: You will need to be logged in as a member to use.

- Timing – Reach matters but geography doesn't. If you want to attract an international audience, virtual events are particularly appealing.
The length of the event should be carefully managed to avoid screen fatigue. For example, a programme could be delivered over a series of short sessions e.g., 2 hours in the afternoon. Regular breaks need to be factored into the programme.
- Delivery – Consider your audience and think about accessibility for all participants
It is important that the trainer/speaker is aware of their background image on screen – so the audience is not seeing something that they should not.
Rehearsal time to use the digital platform should be offered – to ensure a smooth delivery on the day.
The beauty of virtual events is that sessions can be pre-recorded. Permission will need to be agreed with the trainer/speaker – **see Icon's consent form Appendix 5.**
- Think about what interactivity features you may want to include such as polls, quizzes, slide sharing, video sharing Q&A's, chat and social sharing are all ways to make online seminars more interactive.

- Use the Zoom help section to understand how to use breakout rooms/polling/chat function
- Think about copyright and intellectual property **Add Copyright Policy – Consent Form Appendix 5**

3.1 Zoom protocol and security

- All sessions have unique meeting IDs and secure passwords that will only be shared with participants who have booked onto the session
- Recorded sessions see 3.2
- The chat will not be saved automatically
- Participants you will be placed in the waiting room until Icon accepts them into the meeting
- Icon reserves the right to remove any participant from a live session, and will do so if deemed necessary due to inappropriate behaviour
- If you have any questions or concerns about using Zoom email events@icon.org.uk

3.2 Recording events

Recording requirements

- Ensure presenters have confirmed their content can be shared on YouTube after the session. Please note that you can choose whether this will be uploaded as an unlisted video (meaning that only those with the link will be able to access) or public (meaning it will appear on Icon's YouTube channel and so available to anyone to access).
- Use the Icon consent form: **Awaiting production - Appendix 5**
- Disclaimer – a warning for participants that the session is being recorded should be visible at the start. The disclaimer should note that “if you don't wish to be featured, please keep your camera off / rename yourself”.

During the session

- Meeting Host to set to record at start. Ensure that it is being set to 'record to the cloud', which means it can be downloaded after the event.
- Host to ensure set to 'Speaker View' that way it will only record the person who is talking, otherwise it will be set as 'Gallery Mode' meaning that all participants will be visible on the recording.

- Remind participants of the disclaimer about being included on the recording is highlighted at the beginning of the session.

Editing

- After the event you can download the recording (please note it may take an hour or so to become available to download).
- Organiser to edit the video to remove any parts of the video which should not be part of the final recording. You can also edit out gaps between presentations as appropriate.
- Editing can be done on free to use software such as Microsoft Video editor or iMovie on macs.
- Ensure you inset images as title slides as appropriate during the recording.

Uploading content

- The content should be shared with Icon via events@icon.org.uk and use Dropbox, Wesend it or similar.
- Provide Geanina with a brief description (2-3 lines) about the webinar including the title and the main points covered in the video.
- The video will then be uploaded to YouTube. This can be set as unlisted or public (as indicated above re permissions).

Example Icon video: <https://www.youtube.com/watch?v=liuKNgJzLY&feature=youtu.be>

3.3 Budget

Go to section 5 on Event budgets.

Costs specific for virtual events may include:

- On-line platform (if not using Icon's Zoom account)
- Recording equipment

On-line platform providers

Who signs this contract will be dependent on the cost of the venue (only invoices under £1,000; above this needs Icon office approval). If in doubt, contact the Icon Business Director.

Make sure that the confirmation makes it clear that the booking is being made for The Institute of Conservation and include the Icon address, so if there is any liability for the use of the provider then it falls to Icon not you personally or your employer.

If you need to pay a deposit to confirm a booking (either by invoice or to go with a booking form) then you should contact accounts@icon.org.uk

If you receive any other invoices connected with running the event, then your Group Treasurer should submit to the iCompleat system.

On-line providers used to date by Icon include:

<https://www.accelevents.com/>

<https://www.microsoft.com/en-ww/microsoft-teams/free>

ADD to the list as more identified and used

4. Event Budget

General Principles

All actual costs (speaker fees, venue and catering costs, online connection costs, credit/debit card fees etc) need to be identified and covered by participant prices or some identified funding source, including grants or the Icon annual group budget allocation.

First step – complete the Event brief budget – **see Appendix 1** – this will help you to do an initial estimate costs and work out how feasible it will be to run.

Next step is to complete the budget spreadsheet – **see Appendix 4** - and discuss it with your Group Treasurer. Do not make any financial commitments without the agreement of you Treasurer who will contact events@icon.org.uk if appropriate.

If your Group estimates that your expenditure for an event will be greater than income over the course of the financial year, this may need to be considered by the Conferences Committee. If in doubt, contact events@icon.org.uk

4.1 Pricing and ticket types

Events should be budgeted to at least break even and ideally make a small surplus. There may be sponsorship or grants available, and or your Treasurer may agree to contribute some of the Group funding to keep the costs down. All this information should be included in the budget.

Charging non-members is required to indicate membership benefit.

Any surplus generated by these events is retained by the Group until the end of the financial year. Groups might want to use this to subsidize their AGM. Surplus from Network events is held within the specified Icon account department again until the end of the financial year.

Event Fee

To make sure that the event breaks even or makes a slight surplus, the breakeven event fee needs to be calculated to produce the **Icon member rate**.

Icon student members should normally pay less than Icon members – 80% of the standard price or £10 whichever is the greater. Students who are not members should pay the non-member rate.

The fee for non-members should be 20% higher or £10 whichever is the greater, rounded up to the nearest £5.

If the fee is free to members, then non-members should be charged at least £10. An exception to this principle would be when an external funder makes free or reduced cost participation a condition of their grant.

Early Bird rates

Early bird reductions can be offered, particularly for large conferences where there are significant upfront costs for venues, catering etc. The purposes of early bird discounts are:

- To assist with cash flow management
- To get early commitment to attend
- To help organisers judge whether the event will be a success and if necessary, decide to cancel or reconfigure the event
- To provide additional marketing 'talking points'

Refund and transfer policy

Payment is taken when an event is booked.

Attendance can be cancelled any time up to 1 working day before the event. Refunds will be made based on:

- Cancelled 4 weeks or more before event – full refund
- Cancelled less than 4 weeks before event – 50% refund
- Cancelled less than 2 weeks before event – no refund

Attendees can transfer their booking to another person any time up to 1 working day before the event.

When a booking is transferred to another person who would normally pay more than the original attendee, then the balance will be payable at the time of arranging the transfer. Refunds will not be paid if the transfer is to a person who would normally pay less than the original attendee.

All refunds and transfers will be handled by Icon staff.

Only paid delegates will be eligible to receive the recording of an event.

4.2 Types of Costs

The total cost of the event is made up of two types of cost – fixed and variable:

1. **Fixed costs** are those which are charged to the event as a whole and which will have to be met in full, irrespective of the number of participants. The total of fixed costs must be divided between all the delegates as part of the process of calculating the event fee. To make sure the event is viable the total of fixed costs should be divided by the minimum number of participants rather than the average or maximum.
2. **Variable costs** are those which are charged "per person" basis – such as tea/coffee/lunch supplied at the venue.

4.2.1 Fixed Costs

Fixed costs comprise of several different items, as follows.

a. Venue Costs

The venue costs are the total cost of hiring the training room as well as any AV or IT equipment and or other requirements supplied by the venue.

The hire of rooms and other facilities which are used just for training/education purposes should be VAT exempt, although you may find that some venues do charge VAT irrespective of the use. Some venues have special forms to certify that the facilities are to be used exclusively for training/education which you may need to fill in. Other venue charges, including refreshments, will have VAT charged at the standard rate. Make sure you check if VAT is included in any of your quoted costs – if you are going to have to pay VAT then make sure you include it in the budget calculations.

Some venues offer special rates for registered charities, so it is always worth asking if there is a discount for a registered charity. You may be asked to give Icon's details. Icon's friendly landlord CIWEM gives Icon a discount for its meeting rooms if booked through events@icon.org.uk. See <https://www.ciwem.org/venue/>.

The Institute of Conservation is a company limited by guarantee registered in England No, 5201058. VAT No. 885387955. The Institute is a charity registered in England & Wales (No. 1108380) and Scotland (SC039336).

There are some venues which will not charge separate room hire and refreshment costs but instead will have a per person rate incorporating these elements. This means you will not have venue fixed costs but instead a higher per person rate in your variable costs section. If your venue is charging on this basis, you should also include the cost of a delegate fee for speakers/session leaders and training officer.

Remember to check if VAT is included and if possible, try to ensure that no VAT is charged on the room/facilities hire elements.

b. On-line costs

Similarly, if you are planning an on-line event with any other on-line platform provider the same applies as for the venue.

c. Venue Costs Waived in-lieu of Delegate Place

If the venue is offered free of charge in return for a delegate place this still has to be included in your budget – simply put the cost of the venue in the budget at the rate of the delegate fee.

If items are being provided totally free, you still need to include them in the budget but at 0 costs.

d. Special Equipment/Materials Required

Occasionally you may have to hire a piece of equipment or material which the venue cannot supply or is required for an on-line training session. Try and get a reliable quote for these costs early on although sometimes you can make an informed estimate after researching potential suppliers. Make sure that VAT is included in any quote or estimate. The Icon Book & Paper Group has a projector and laptop which can be borrowed. Enquire via events@icon.org.uk

e. Speakers Fees

It is expected that you will invite them to propose a fee. Speaker fees should be included as a fixed cost plus any T&S³ required. If they wish to attend the full event, you can include this as a benefit to help you negotiate the fee.

Some speakers will happily offer their services on a pro bono basis and should not be charged to attend the full event.

f. Session Leaders/Event Organiser Costs

These are the costs incurred by each person attending the event who is not paying an event fee – this is normally the session leader as well as the training officer(s). Once these costs are all added together then they are divided between your fee-paying delegates as one of the fixed costs.

g. Insurance

Training events held at venues need to be insured to cover any possible liabilities. Small events are covered by Icon's normal insurance policy but if you are planning a conference with over 100 delegates, please contact events@icon.org.uk for advice.

4.2.2 Variable Costs

Variable costs are those which apply "per person". These are:

a. Venue Delegate Rate

This is the rate "per person" for the venue or on-line platform cost.

b. Catering Costs

A full day event will normally require you to provide refreshments and lunch. Sometimes it is quoted as an inclusive cost for all venue facilities (in which case there will be no venue cost included in the fixed costs section of the budget).

c. Certificates of Attendance

Request a Template from events@icon.org.uk

³ Icon will pay reasonable expenses for speakers travel and subsistence based on Icon's expenses claim form rates. The latest form can be found at <https://icon.org.uk/resources/icon-document-library>. You need to be signed in as a member to access this form.

4.3 Contingency and card fees

The contingency is an additional 10% which is added to the actual cost per participant to help cover any unforeseen expenditure or overspend.

The additional 4% will cover this administrative cost to Icon for card payments.

4.4 Sponsorship

Some companies are willing to sponsor an Icon event to associate their name with the conservation profession. This sponsorship can be a financial contribution or in kind. Sponsorship can have a significant effect on the overall delegate fee for your event.

In return for sponsorship most companies will want a return- this may be having their logo on the programme, a leaflet in the delegate pack or maybe exhibition space at the venue.

If you would like to arrange or attract sponsorship for an event you are running you must contact Icon's [Chief Executive](#) who can advise on all issues relating sponsorship such as what contribution from your sponsor is appropriate and arrangements about publicity. Use of the Icon logo on any sponsors publicity material must be approved by the Chief Executive.

Sponsorship is a business contract and is subject to VAT. Once terms have been agreed with the sponsor, your Treasurer should ask events@icon.org.uk to issue a VAT invoice. Overseas sponsors may be zero rated for VAT.

5. Publicity and Bookings

As soon as you have planned the event, the publicity for it should start. You will need to think about what you want to say about the event programme, your intended target audiences, and what forms of publicity you are going to use.

Publicising the event will not be a one-off activity – it will be an on- going and responsive process in a variety of different forms.

5.1 Icon promotion

- Icon’s website will be used to promote all Icon events.
- An event form will need to be completed and sent to events@icon.org.uk
- Inclusion on Social Media: email events@icon.org.uk You must send information about the event and a caption with an image/link back to Icon website.

Other places to promote your event for free using an Icon weblink will help to draw non-members attention to the Icon website:

- Heritage Alliance [Heritage Update newsletter - The Heritage Alliance](#)
- AIC add further links here

5.2 Content for the publicity

5.2.1 Event Description

The event description is not the same as the Event Specification or the final programme but a short description of the event about 100 – 350 words.

A longer description does mean that your event looks better when it is posted on the website and provides your prospective customer with more detail about what they are going to learn.

The event description should cover at least:

- Title – a good title is very important in attracting attention. Make it short and snappy if possible. Puns and humorous titles also work well as they are likely to be remembered. If the title isn’t self- explanatory a secondary tag line or subtitle after a colon might be necessary.
- Event summary – who is providing the event (Icon Group/Network/PD team) and a short outline of what it is about. If the event is associated with a business meeting mention this here too.
- You should give a bit more information on the aims of the day and who your event is for. Let people know the benefits and outcomes of the day i.e., indicate the level of the event or whether any prior knowledge is necessary (or not).

- Venue, date and times – people will want to know where it is, when, and how long it lasts. It may be useful to add a few details about the venue such as proximity to transport links. If the venue is of interest itself (i.e., a new building) you should emphasize this. You can mention other attractions near the venue if this may attract more delegates.
- Lunch/refreshments – if they will be provided as part of the fee.
- Fees – Icon member, student member and the non-member fees, as identified from the budget spreadsheet – Appendix 4

You can also add other information onto the event description such as:

- More details on the event programme such as the individual topics covered and the formats (i.e., presentations, workshops, hands on etc.)
- Details of who the main speakers are – particularly if they are ‘big names’ who may help to attract participants.
- Who to contact or where to go for more information – this can be a link to Icon’s website or your contact details.
- Indicate if any grants are applicable see: [Grants and Opportunities \(icon.org.uk\)](https://www.icon.org.uk/grants-and-opportunities)

The event description layout should be broadly the same in each of the different place’s publicity is issued, although you may want to alter it slightly for some media.

If any of the important details are unconfirmed at the time of sending out publicity, it is fine to state that the programme is “draft”, or that additional speakers are to be confirmed.

Once the programme is complete – add a link to that too.

5.3 Bookings

All Icon event bookings will be managed by [Eventfolio](#) – a new system that interact with Icon’s website and Icon members personal record.

6. Preparing for the Event

Once you have advertised the event and are on track to attract the minimum number of delegates then you need to prepare for the training day – **regardless of if it is held at a venue or online.**

You should try and do this work as early as possible and not leave it to the week just before the event.

- Identify roles and responsibilities to ensure a smooth operation of the event i.e., catering is in order, IT is set up appropriately.
- You may need to put signs up directing delegates to the correct room or building within the venue – please produce a printed sign. Icon Group logo available from events@icon.org.uk
Some venues will do this for you while others you will have to put them up yourself.
- Contacting the venue to confirm any final details and notify them of the expected numbers, finalise room layout and IT requirements.
- If catering has been booked – provide final numbers and specific dietary requirements.
- Preparing the joining instructions, event programme and any other information required by delegates and/or speakers before the event.
- Contact the speakers confirm everything is arranged.
 - For venue based** - get details of their travel arrangements. Provide them with a contact mobile number in the event of any problems that may occur on the day. Ask all your speakers to send you any presentations in advance and make sure you take these with you on the day (in more than one format).
 - For on-line** – plan the delivery of their presentations – e.g., rehearsals to check IT connections and management of Zoom.
- Send out information to the speakers, including all the information as sent to participants, plus expenses claim forms or request an invoice.
- Produce the registration form to record the delegates and speakers – usually required for H&S by the venue
- Deal with all invoices and claims submitted for payment such as the venue cost and expenses.

All this information should be sent out at least 1 week before the event.

7. Organisation on the Day

The event requires an appointed facilitator on the day of the event to make sure everything runs to plan and to deal with any problems which may arise on the day.

Before the start

The facilitator needs to be at your venue around 45min to an hour before the advertised start time for registration – remember some delegates will probably turn up early.

Zoom set up should include a 30-minute buffer upfront to check connections.

You will need to carry out the following activities and checks before the registration process begins:

- Meet the venue staff and confirm that everything is as you expect it. Ask if there is anything you need to tell participants - such as health and safety information. Confirm the location of the facilities and arrangements for lunch/coffee breaks. Check the layout doesn't need any amendments.
- Confirm that the IT or AV equipment is working as needed. If you have the speaker's presentations already get them loaded onto the system. If any of the speakers have requested internet access check that it works. Do any video or audio clips in the presentations work? Ask for a contact for if there are any problems with the technical equipment.
- Set up a welcome page on the screen showing the title, the Icon Group logo - available from events@icon.org.uk and hashtag for social media. This provides a great opportunity to promote Icon.
- Set up the registration desk (venue based).
- Some speakers may have notes to go alongside their presentations.
- If you will be using twitter during the day, put up a sign about your hashtag and any speakers or organisers to follow.

Speakers

Once your speakers have signed in you should show them the set-up of the room/Zoom connection and explain how the AV/IT system works. Remind them of the length of their session and whether or not it includes questions. Check that they are happy to take questions at the end of their session. You should tell them that you will give them a signal 5 minutes before the end of their session to help the programme run to time.

Welcome

At the start of the day the facilitator or the chair of the event is responsible for the welcome. This should cover:

- Welcome (remember to mention that this is an Icon event organised by the Group/Network).
- Thank all the delegates and speakers for coming.
- Arrangement for lunch and coffee breaks (where, if provided etc).
- Health and safety - advise on the fire evacuation procedures
- Location of the facilities – toilets, drinking water etc
- Brief introduction to programme for the day
- Advise delegates if the presentation will be recorded and made available on the Icon website afterwards.

During the event

The chair or facilitator should introduce each speaker before their session. Give their name, their organisation or office and the title of their talk or workshop. After each talk you should thank the speakers and then ask for any questions and select delegates wishing to ask questions.

Arrange to give each speaker a 5-minute warning of the end of their allotted time to help keep your programme running to time.

End of the day

At the end of the day, you should:

- Thank everyone (speakers and delegates) for coming and for their input into the day.
- Inform delegates that an online evaluation form will be emailed to them – and emphasize their importance for future event planning - thank them in advance for completing it.
- Inform delegates that Certificates of Attendance will be provided on request by email.
- Thank the speakers personally and ensure they understand how to make an expense claim.

8. Post event actions

Straight after your event you will need to complete some administrative tasks.

Speakers

You should contact all speakers after the events and thank them for their contribution to the day. If any of your speakers are charging a fee, they will need to send you an invoice to upload on iCompleat.

Icon website /Icon News

Upload any presentations on the Icon website and send an event report to Icon News.

Event Evaluation

You can use Survey Monkey or Google forms to gain feedback on the event.

Event Evaluation Template is being created for Eventfolio

APPENDICES

Appendix 1 Event Brief Template	26-28
Appendix 2 Novice to Expert Scale	29
Appendix 3 Icon Professional Standards and Judgment & Ethics	30-32
Appendix 4 Pricing guidance	33-34
Appendix 5 Icon consent form	N/A
Appendix 6 Diversity & Inclusion guidelines	35-40

Appendix 1

Event Brief Template

Icon Events

EVENT TITLE | Brief

Date:

Time:

Venue:

1. Purpose of the event

Provide a brief outline of the purpose of the event, why are you running the event and what are you trying to achieve.

2. Objectives

Outline the key objectives of the event. Which Professional Standards does this event address?

3. Target Audience

State the total number you are expecting to take part in the event. Break down the types of audience, e.g., Icon Members, Accredited Conservators, members of the public, etc. and the level of training being provided - see Novice to Expert Scale

4. Event Format

Outline how the event will be delivered, will it be face to face or online, how many sessions will you run, will there be workshops, etc?

5. Key topics

List the key topics the event will cover.

6. Communication

Bookings

All bookings will be managed via Eventfolio

Promotion

Complete the table below with your promotional activities.

Activity ¹	Audience ²	Channel ³	Deadline ⁴	Lead ⁵

1. What is the activity
2. Who are you targeting, Icon members, members of the public etc.?
3. Iconnect, social media, print advert, etc.
4. When is the deadline?
5. Who is leading on this activity?

7. Running times / speakers

Time	Session	Speaker	Notes

8. Suppliers / Partners

Please list your suppliers and partners below.

9. Budget (Estimate)

Please amend the table below to breakdown the event budget. **ADD a list of possible expenditure** do we have sufficient resources?

<u>Item</u>	<u>Details</u>	<u>Planned Income</u>	<u>Planned Expenditure</u>
Ticket Sales	£	£ -	
Sponsorship and Grants		£ -	
Speaker Fees			£ -
Speaker T&S			£ -
Room hire			£ -
Catering			£ -
Printing Costs			£ -
Certificate posting			£ -
	<u>Total</u>	<u>£</u>	<u>£ -</u>
	<i>Surplus (deficit)</i>	<u>£ -</u>	

10. Event Outcome

Please outline the outcome of the event.

11. Contact details

List the key contacts of those who are organising the event.

]

Appendix 2

Novice to Expert Scale The blue highlighted boxes indicate the level required by an ACR.

	Knowledge	Standard of work	Autonomy	Coping with complexity	Perception of context
1. Novice	Minimal, or 'textbook' knowledge without connecting it to practice	Unlikely to be satisfactory unless closely supervised	Needs close supervision or instruction	Little or no conception of dealing with complexity	Tends to see actions in isolation
2. Beginner	Working knowledge of key aspects of practice	Straightforward tasks likely to be completed to an acceptable standard	Able to achieve some steps using own judgement, but supervision needed for overall task	Appreciates complex situations but only able to achieve partial resolution	Sees actions as a series of steps
3. Competent	Good working and background knowledge of area of practice	Fit for purpose, though may lack refinement	Able to achieve most tasks using own judgement	Copes with complex situations through deliberate analysis and planning	Sees actions at least partly in terms of longer-term goals
4. Proficient	Depth of understanding of discipline and area of practice	Fully acceptable standard achieved routinely	Able to take full responsibility for own work (and that of others where applicable)	Deals with complex situations holistically, decision-making more confident	Sees overall 'picture' and how individual actions fit within it
5. Expert	Authoritative knowledge of discipline and deep tacit understanding across area of practice	Excellence achieved with relative ease	Able to take responsibility for going beyond existing standards and creating own interpretations	Holistic grasp of complex situations, moves between intuitive and analytical approaches with ease	Sees overall 'picture' and alternative approaches; vision of what may be possible

Figure 1: Adapted from the Dreyfus model of skills acquisition: Dreyfus, S.E. (1981) and Dreyfus, H.L. & Dreyfus, S.E. (1984).

Appendix 3

THE INSTITUTE OF CONSERVATION'S PROFESSIONAL STANDARDS AND JUDGEMENT & ETHICS

These professional standards are embedded within all of Icon's professional development functions and should be read in conjunction with the Institute of Conservation's Code of Conduct. This version of the Professional Standards was approved by Icon's Board of Trustees 24th June 2020.

Standard 1: Assessment of cultural heritage

A conservator has the ability to assess cultural heritage that presents complex conservation problems. A conservator must:

- a. Understand the significance and context of the heritage to be assessed, along with any implications for potential conservation measures.
- b. Assess the physical nature and condition of the heritage.
- c. Assess the impact of the environment and potential changes on the heritage.
- d. Assess the implications of taking no further action.
- e. Report on the findings of the assessment.

Standard 2: Conservation options and strategies

A conservator is able to evaluate options and negotiate actions in contexts that present complex conservation problems. A conservator must:

- a. Identify and evaluate conservation options.
- b. Develop advice, recommendations or policies relating to the different options available.
- c. Develop or negotiate a considered course of action for implementation.

Standard 3: Conservation measures

A conservator, regardless of role, can work effectively with situations and aspects of heritage that present complex conservation problems, and can deal effectively with any unanticipated problems or findings. A conservator must:

- a. Communicate appropriate practice in the care, protection and treatment of cultural heritage.
- b. Implement conservation measures.
- c. Ensure that measures and advice follow recognised conservation standards.
- d. Monitor and evaluate the effect of conservation measures.
- e. Document conservation measures.
- f. Recommend appropriate sources of further analysis, treatment or preventive care where these lie outside your remit or area of expertise.

Standard 4: Organisation and management

A conservator, regardless of position, can manage conservation work that presents complex conservation problems. A conservator must:

- a. Organise and manage work to ensure that it is completed appropriately.
- b. Ensure that your work practices and any you promote comply with applicable legal and contractual requirements.
- c. Ensure that your work practices and the area for which you are responsible comply with relevant Health & Safety regulations and guidelines, minimising risk to yourself and others.
- d. Adhere to good business or internal practice in dealing with clients, colleagues and other stakeholders.
- e. Ensure that adequate and accessible records are maintained.

Standard 5: Continuing professional development

A conservator can demonstrate through continuing professional development (CPD) active maintenance and improvement of professional knowledge and skills. A conservator must:

- a. Keep yourself informed on changes in the profession as well as broader developments relevant to your work context.
- b. Ensure that your practice, knowledge, skills and techniques are up to date, both at a general level and in relation to individual projects and tasks that you undertake.
- c. Reflect on and learn from your practice.
- d. Promote conservation and the care of cultural heritage to expert and general audiences.

Professional Judgement and Ethics

Professional judgement and ethics are a core component of the professional standards. A conservator must:

- i. Understand the principles of conservation and demonstrate an in-depth understanding of the specific area(s) of your practice.
- ii. Be conversant with national and international principles, philosophies and guidelines relevant to your practice.
- iii. Understand the ethical basis of the profession and the responsibilities of the conservation professional to cultural heritage and to wider society.
- iv. Understand and observe the Icon Code of Conduct.
- v. Use an adequate level of critical thinking, analysis and synthesis in approaching conservation problems and developing appropriate solutions.
- vi. Appreciate and be prepared to consider alternative, valid methods and approaches that are relevant to your practice.
- vii. Observe legal requirements and obligations, including those relating to health and safety, the environment, employment and contract law, and international agreements.
- viii. Take responsibility for the care of cultural heritage within your influence.
- ix. Act with responsibility towards the environment, promoting environmental sustainability in conservation practice and minimising adverse environmental impact.
- x. Act responsibly and ethically in dealings with the public, employers, clients and colleagues.
- xi. Act with awareness of and respect for the cultural, historic and spiritual context of objects and structures.

- xii. Understand how the context in which conservation is carried out influences the practices and measures that are appropriate and acceptable.
- xiii. Handle value-conflicts and ethical dilemmas in a manner which maintains the interests of cultural heritage.
- xiv. Understand the limits of your own knowledge and abilities, and practise within them.

Appendix 4

Pricing Guidance

Pricing structure						
Icon member	Break even cost					
Student member	80% of break even cost or £10 whichever is the greater					
Non member	20% higher than break even cost or £10 whichever is the greater					
Expenditure costs	Notes					
Room hire						
On-line platform						
IT equipment						
Speakers fees						
Speakers T&S						
Photocopying/postage						
Promotion						
Printings costs						
Lunch	VAT to be noted					
Refreshments	VAT to be noted					
Sub Total						
Plus						
Contingency @10% of sub total						
Card admin @4% of sub total						
Sub Total						
Group budget contribution	If applicable deduct from sub total					
Sponsorship	If applicable deduct from sub total					
Sub Total						
Total event expenditure						
Break even delegate fee						
Total event expenditure						
minimum no. of delegates						
Total cost per Icon member						
Round up to nearest £5						

See example budget sheet on page 27

Example budget sheet

Expenditure costs	£	Notes					
Room hire	100						
On-line platform	0						
IT equipment	50						
Speakers fees	200						
Speakers T&S	100						
Photocopying/postage	30						
Promotion	0						
Printings costs	0						
Lunch x 20 x £10	240	VAT to be noted					
Refreshments x 20 x £5	120	VAT to be noted					
Sub Total	840						
Plus							
Contingency @10% of sub total	48						
Card admin @4% of sub total	19.2						
Sub Total	67.2						
Total event expenditure	907.2						
Group budget contribution	0						
Sponsorship	100	If applicable deduct from sub total					
Sub Total	807.2						
Break even delegate fee	£						
Total event expenditure	807.2						
minimum no. of delegates	15	Based on 70% attendance					
Total cost per Icon member	53.8						
Round up to nearest £5	£55						
Icon member	£55 Break even cost						
Student member	£44 80% of break even cost or £10 whichever is the greater						
Non member	£66 20% higher than break even cost or £10 whichever is the greater						

Appendix 6 Diversity & Inclusion Guidelines

Introduction

This appendix includes advice on creating an event which fosters diversity, inclusion and accessibility. It is not a definitive guide, but should be used as a starting point, in ensuring the ability of all attendees to participate meaningfully in the event and benefit from it. Events and conferences provide opportunities for professional development, networking and knowledge sharing, therefore if events are not designed in an inclusive manner, they risk reinforcing or accelerating inequalities. Although we realise that event organisers often have limited funding and time available, with factors such as venue cost often being a main driver of selection, it is necessary to consider accessibility and inclusion. This is both as a legal obligation, to provide reasonable adjustments ensuring events are accessible to those with disabilities, and to guarantee we meet one of our key values ‘to value diversity and ensure that opportunities are open to all those who want to care for our heritage’.

Planning an Event

Date, Time, and Scheduling

- If possible, choose a date which does not fall within key religious, national or school holidays
- If feasible, choose a time that will allow people with caring responsibilities to attend
- Consider that an annual event which takes place on the same dates every year risks excluding the same people every year
- Think about how networking can be built into the schedule of the event. If left until the end of the day this can exclude participants, for example those with caring responsibilities, or conditions which cause fatigue
- Ensure regular breaks are built into the event, and consider the impact of an overrunning schedule on breaks
- If moving between rooms and venues, as well as ensuring this is accessible, ensure transfer time is built into the programme
- Announce the date and time of the event early to allow for planning
- Consider the diversity of the speakers at the event

Pricing

- Think about the accessibility of the price point of the event
- Consider providing provision in the budget or linking funding to the event, allowing participants with less financial means cheaper or free ticket options
- Unbundle the ticket price, for example can participants attend a morning session rather than the whole event or can they opt out of lunch rather than automatically including food as part of the ticket price

Advertising Your Event

- Communicate information about the accessibility of your event as standard. Don't depend on your participants to ask for specific accommodations when they don't know what is already in place. Ensuring a basic level of accessibility will benefit many of your attendees and will also reduce the need for individual adjustments
- Ensure you communicate the details of your event in plain English. If your event is online, consider that participants might be accessing it from different time zones. Be as clear with your details as possible
- Include information about the format of the event, details of breaks and a rough schedule if possible. Include the number of places available. This will help potential participants assess whether the event might be too overwhelming or uncomfortable for them
- Consider if your advertising materials are accessible in and of themselves. If you are using a video to advertise, make sure there are captions. Ensure you have added alt text to any images. Avoid putting event details into an image as these aren't visible to screen readers
- By giving details up front about the accessibility of your event, you are communicating to a wider audience that diversity & inclusion are values you care strongly about
- Include an email address or other contact details so participants can ask questions about the event

Booking Form

- When you are designing your Booking Form, ensure that you are only collecting information you actually need (i.e., avoid asking for a title or requiring participants to specify their gender unless it is absolutely necessary. If necessary, ensure gender neutral options are available or allow participants to self-describe)
- If food and/or refreshments are being provided, ask about dietary requirements
- Ask specifically if you will need to provide any accommodations additional to what you have already arranged. It can be difficult for participants to initiate a conversation about their requirements. By asking directly, organisers can indicate that they're supportive and willing to help
- Include in your Booking Form an option to book a place for a carer, free of charge

In Person Events - Event location

- Location - Consider the location of your event. Would hosting or repeating the event in another geographical region enable a wider group of participants to attend
- Accessibility of the space – Ensure all rooms are easily accessible for all attendees, that there is easy access between rooms used (think about stairs, lifts, ramps, manoeuvrability in the space), consider whether the stage area needs to be accessible

- Don't rely on the access information provided to you by the venues. Build in a site visit. Take extra photos, check acoustics & take video of the access routes
- Transportation to the event – Ensure transportation to the event is accessible. Consider whether parking is available and whether public transport is available. Are available public transport methods accessible to those with additional needs
- Sound – Ensure microphones and hearing loops are available. Think about whether sound quality in the space is good and free from distractions
- Budget for the provision of live captioning and a lip speaker/signer as standard. Providing live captions should be the norm as they improve accessibility not only for deaf people but also neurodiverse participants, those for whom English is not a first language, and anyone who may lose track of what has been said
- Bathrooms - Ensure there are accessible bathrooms within an easy distance of the function rooms used. Consider whether there is a gender-neutral bathroom available
- Additional rooms – Consider protected characteristics when deciding whether additional rooms are needed. Will you need a prayer room and/or a room for nursing? Is there quiet space where participants can retreat if they have sensory overload?
- Childcare - Consider whether providing childcare will increase accessibility of the event, does the venue allow children on site
- Streaming – Can the event be made available online to increase participation. Following the event, can a recording be made available
- Atmosphere – Think about the atmosphere of a space and whether the location may alienate some participants
- Safety – Especially for events ending later or overnight events, consider safety for those travelling home, for example is public transport within quick access of the venue and along a well-lit route
- Networking – Ensure any space used for networking in the event is accessible and consider how the area facilitates this. For example, providing seating for all ensures those who are unable to stand for long periods are accommodated without being excluded from conversation
- WiFi – Consider whether WiFi is easily accessible

In Person Events - Food and Drink

- If providing food, collect information prior to the event about dietary requirements and preferences. If a buffet is provided ensure options are clearly labelled with dietary information
- If there is alcohol provided, ensure there are adequate alcohol-free alternatives offered

Pre-event Communications

- Provide participants with a schedule of the day. Providing a list of attendees can give participants an indication of the scale of the events as well as facilitate networking
- Remind speakers before the event to speak slowly and to ensure that any presentation slides are clear
- Consider whether transcripts, slides or preprints can be shared prior to the event. If this is not possible, will speakers consent to sharing them after?
- For in person events send maps and layout of the area and venue ahead of time, including information on transport to the event

On the day

In person events

- Ensure adequate signage is available and obvious
- Ensure any signage and printed material is consistent with recommended best practice from sight-loss and dyslexia charities. If you are using the services of a designer, ensure the brief you give specifies your access requirements
- If disseminating written material digitally, ensure you provide it in multiple formats so that participants can alter the font, size & colour. Have a hard-copy available for people who cannot use the digital one
- Ensure that any sustainability commitments you have made do not further limit access for disabled people
- Nominate a contact for people to report incidents or ask for assistance. For example, those with mobility needs may require additional support at breaks, in carrying food or drinks, or may need assistance in the event of an emergency. Ensure this contact is clearly visible
- Ensure points of contact are well briefed on accessibility, for example are aware of accessible routes through the venue and the location of accessible toilets when giving directions. It is important to not assume ability when giving directions
- Using name labels is a useful tool to facilitate networking. Consider using a name label template which allows participants to choose how they identify themselves
- Consider how to promote greater inclusivity in Q&A sessions, for example providing an anonymous way to ask questions. Ensure any questions asked are clearly repeated
- If a photographer is available at the event or pictures are being taken to share online, ensure participants have given permission and are able to opt out if they don't want their images to be used

Online Events

- Online events are generally more accessible than those held in person. It is worth considering that if you are holding an in-person training event, whether some part of

it can be adapted to be online (i.e., if your training consists of a lecture and a workshop, could the lecture also be streamed for a different audience?)

- Consider if you can record the event and make it available to participants. This will help not only people who could not attend on the day but enable participants to concentrate fully on the content of the event, rather than worry about taking notes and potentially missing something.
- Ensure that any resources you provide to participants both before, during and after the event are in accessible formats, where participants can change the font, size & colour to meet their needs. Tell participants what resources they should receive and when they can expect to get them
- Icon already has a Zoom membership. In a survey, Fable found that Zoom was preferred by disabled people, and considered the most accessible platform for meetings. It is fairly easy to operate, allows users to join via browser and apps, it enables users to spotlight and pin, and has added functionality for third-party apps.
- Be aware that technology may fail you or your audience at some point. Have a tech host on standby to support any issues. Plan for rehearsals and tests
- At the start of your event, take time to set out the ground rules (e.g., using mute, using cameras, how people can contribute)
- If possible, do not require participants to turn on their cameras. It is useful to remind participants they can alter their display name to include preferred name and pronouns
- Ensure people have different ways of communicating (e.g., raising hands/waving/using the chat box)
- Consider scheduling breaks more often than you would in an in-person event. Online events can be particularly exhausting. The onus should not be on participants to request a break. By building it into the schedule, it will give everyone the opportunity to not only move away from the screen but also reflect on content
- Maximise the sound and video quality. Ensure the host and speakers are well-lit, and that the speaker's mouth is visible. If possible, consider using headsets
- Provide some form of captioning. Captioning services provided by a real human are preferable as they are more accurate, but auto-generated captioning is better than nothing
- Encourage speakers to create clear slides but also describe the content of them within the presentation. Relying on visuals for information can reduce accessibility, particularly to those with dyslexia, dyscalculia and literacy difficulties. Screen share is not accessible to screen readers, and complex graphs can often be difficult to make sense of on the spot
- Encourage speakers to use plain English, using concise and clear language and avoid the use of metaphors/idioms where possible. This will benefit participants who are neurodivergent and those for whom English is not their first language

- If someone has access needs you do not understand, politely ask them to explain how best to support them. Disabled people are experts in their own needs. Listen to them!

Following the event

Collect feedback on the event, including information on accessibility and inclusivity. Use this feedback to continue to improve your events

Sources used in the compilation of this handbook

Charity Digital

University of Kent

ARA Training Handbook

<https://www.drakemusic.org/blog/becky-morris-knight/accessibility-in-video-conferencing-and-remote-meetings/>

Icon Diversity & Inclusion Task and Finish Group

