International Actuarial Association
Association Actuarielle Internationale

Protocol for Hosting a Section Colloquium

Purpose:
This Protocol serves as a formal guidance document between the IAA Section(s) and the host local member association for organising IAA Section colloquia. Its overarching aim is to provide clear guidelines ensuring colloquia are well-organised, financially sound, and consistently represent the IAA's standards — while allowing flexibility for improvement and adaptation.

Objectives:

- Define the roles and responsibilities of both the Section(s) and the host association.
- Establish a structured process for applying, planning, and executing a colloquium.
- Ensure financial transparency and viability through clear sponsorship and budgeting frameworks.
- Maintain IAA branding and quality standards across all colloquium communications and materials.
- Support continuous improvement through post-event reporting and knowledge sharing.

Scope:
This Protocol applies to all IAA Sections organizing colloquia (outside of Congress years), and to the host local member associations hosting them. It covers the full lifecycle of a colloquium — from application through to post-event reporting — and also applies to jointly organized colloquia involving multiple Sections.

Summary of key points:

- General
- Application
- Financial Considerations
- Marketing
- Scientific Committee and Meeting Format
- Social Events and Hotels
- Post Colloquium

Policy Content:

General

This Protocol should be considered as guidance between:

A. the Section(s) as the responsible body(ies) for organizing Section colloquia (except in Congress years), and

B. the host association(s) actually hosting the colloquium.

An IAA Section can hold a colloquium in a specific location subject to the support of a host local member association. This requirement will not apply to venues where there is no local Full Member or Associate Member association.

Multiple Sections can jointly organize a colloquium, in which case the organizational and financial responsibilities should be clearly agreed between the Sections and the host.

In all cases, a formal agreement will be signed between the IAA, on behalf of the Sections, and the host association.

The following are guidelines to help with the organization of a colloquium. The responsibility for a successful colloquium rests with the colloquium organizing committee (COC). The COC is normally composed of representatives of the host association and each of the organizing sections. Exchange of ideas is encouraged as well as experimentation in view of continuously improving the format.

This Protocol is not meant to be rigid. In other words, adjustments are possible, but they should be discussed in advance with the COC. The host should periodically update and consult with the Section or Joint Section Committee, when needed.

Application

1. Application to hold a colloquium must be made in writing to the Sections normally three (3) years prior to the proposed date.
2. Final approval will be given by the Joint Section Committee and/or Section Boards, normally two (2) years prior to the colloquium.

Financial Considerations

The host association can support the colloquium in one of four ways:

1. **FULL SPONSORSHIP:** the host association is fully responsible for the financial viability of the colloquium, and for any profit or loss that might ensue; the host association takes an active role in developing the Scientific/Professional Program.
2. **JOINT SPONSORSHIP:** the host association becomes an equal partner with the Section(s), including participation in the financial results (whether profit or loss) and active role in developing the Scientific/Professional Program. Financial participation can be equal or a variation thereof.
3. **CO-SPONSORSHIP:** the host association does not participate in the financial results of the colloquium or in the planning of the Scientific/Professional Program. The host association helps promote the event and the association's logo is included on the colloquium material along with other co-sponsors.
4. **NO SPONSORSHIP:** the host association does not wish any form of participation, but has no objection to the colloquium being held.

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- Sponsor contributions are encouraged, but the “commercial presence” should be restricted.
- Colloquium fees are to be waived for the President of the IAA or her/his representative and the Section(s) Chairs. Registration fees for approved bursary recipients will be invoiced at the lowest rate available (typically the academic rate) to the Section that approved them.
- The host must advise the COC of the proposed colloquium attendance fee and of a reduced policy for academics, companions and others prior to finalizing the fee. In order to provide an incentive to join the Section, the registration fee for non-Section members should be higher by at least twice the cost of Section membership. The colloquium registration form should facilitate joining the Section by providing a link to the IAA Section Membership Form available on the IAA Website.
- The host association must prepare a budget for consideration by the COC.
- The host association should ensure that the event is covered by insurance appropriate to the event and to the jurisdiction in which it is being held, including event cancellation insurance. In the event of cancellation or postponement, the host and Section(s) should agree in advance on cost-sharing, refund policy, and communication responsibilities, consistent with the event cancellation insurance in place.
- An agreement outlining the duties and responsibilities of each party must be signed by the host association(s) and the IAA.

Marketing

- The first announcement should be made as soon as possible after the location and dates have been determined.
- A website will be set up by the host.
- The IAA newsletters, social media and Section communications, i.e. the ASTIN Bulletin, as well as the Section members’ list, are available for advertising the colloquium. All communications should be prepared by the organizers and provided to the IAA Secretariat for distribution.
- All official colloquium documentation and promotional material (i.e., programs, videos, banners, sponsorship prospectus, etc.) must include the logo of the relevant Section(s), available through the IAA Secretariat.
- Colloquium organizers can encourage employers to support employee attendance by sending a letter to employers of actuaries emphasizing the commercial benefits of attending the colloquium.
- Colloquium organizers should provide an attendance document to all participants for CPD purposes. Gaining CPD through their attendance at the colloquium should be advertised.

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Scientific Committee and Meeting Format

- A Scientific Committee reporting to the COC or individual section representatives will be tasked to review submitted abstracts and accept or reject them. They will also need to review submitted papers for best paper awards.
- The first call for papers should be made in conjunction with, or soon after, the first colloquium announcement.
- As part of acceptance of a paper for presentation at a colloquium, authors must sign an agreement permitting the IAA for subsequent non-exclusive use of the paper or presentation materials on its website.
- Papers and presentations should be available in advance in some form, preferably on the colloquium website or event app.
- The Section(s) should inform the host organization of the preferred program for its colloquium, including such details as the need for a General Meeting, Section committee meeting, General Assemblies, prize ceremony, etc.
- The Section(s), in conjunction with the host organization, should consider whether any sessions need to be recorded.

Social Events and Hotels

The Section(s) will advise of the need for:

- A formal dinner for attendees
- An informal dinner for members of the Section Board, members of the host organizing and scientific committees, and any special guests as a “thank you” event.
- Excursion(s) for attendees and accompanying persons.
- An accompanying persons’ program.
- Organizers should consider dietary, accessibility, and mobility needs when planning venues, meals, and excursions.

Post Colloquium

The organizing committee should:

- Prepare a comprehensive post colloquium report, including financial results, for the Joint Sections Committee on the organization of the colloquium in order to facilitate the organization of future colloquia. Post-colloquium report formats are available from the IAA Secretariat upon request.
- Provide the IAA Secretariat with the names, country and email addresses of all attendees to help market future colloquia, subject to data privacy protections.

Attendee data must be collected, stored, and shared in accordance with applicable data protection law (e.g., GDPR or local equivalent) and the IAA's data privacy policy.

- Provide the IAA Secretariat with statistics on the colloquium such as: number of delegates and accompanying persons in attendance, number of persons attending the various events, number of bedrooms sold per night, per hotel (provide name(s) of hotel(s) used).
- Provide all papers and presentations for inclusion on the IAA event archive.

This policy was first approved in 2016 by Section Chairs. It was last revised by the Joint Section Committee in September 2026. It is to be reviewed by the Joint Section Committee in July 2029.

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