

Preliminary Working Group (PWG)
for the 10th ICCEES World Congress in 2020
(Canadian Proposal)

FINAL REPORT AND RECOMMENDATIONS

Montreal and Sudbury, May 2015

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0. Executive Summary and Recommendations (Motions) in brief

At its May 2014 AGM, CAS passed a motion to convey to ICCEES an expression of interest to host the 10th ICCEES World Congress in Montreal.

At its June 2014 meeting, the ICCEES Executive reviewed the proposals that it had received and accepted the Canadian proposal.

In the fall of 2014, CAS created the Preliminary Working Group to produce a feasibility report and recommendations regarding the next steps to be taken in the planning process.

Recommendations (Motions) to CAS AGM 2015:

MOTION #1: that CAS confirm the Canadian offer to host the X ICCEES World Congress in 2020.

MOTION #2: that the Congress venue be Montreal, 3-8 August, 2020 (or: 27 July – 1 August), and that the competitive Toronto bid be "kept alive" for one year as a fall-back option.

MOTION #3: that a local "Organizing Committee (OC) – ICCEES 10th World Congress 2020" be convened and chaired by a member of the ICCEES Executive and Board to plan, organize and see the event through to completion.

MOTION #4: that the OC be guided in its work by the PWG's recommendations, including:

- 4.1 Make every effort to ensure that the World Congress is held at a university.
- 4.2 Recruit McGill and Concordia Professors (especially CAS members) to the OC's Academic Subcommittee for personal, on-site liaison as employees of the universities.
- 4.3 Contact the persons responsible for meeting spaces at McGill and Concordia.
- 4.4 Report with updates to the executives of CAS and ICCEES annually or as needed.
- 4.5 Incorporate the OC in Quebec to protect in the event of catastrophic cancellation. -- ???
- 4.6 Establish a fund-raising subcommittee to identify and access potential public and private sponsors for student travel assistance and world-class keynote speakers.

MOTION #5: to acknowledge receipt of this Report and Recommendations and to dissolve the PWG.

1. Background:

History

At its 2014 AGM, CAS passed a motion to convey to ICCEES an expression of interest to host the 10th ICCEES World Congress in Montreal.

The expression of interest was received by the Executive of ICCEES at its June 2014 meeting in Norwich, England. The Executive reviewed the proposals that it had received and accepted the Canadian proposal.

Upon receipt of the ICCEES decision, CAS created the Preliminary Working Group.

Aim

to collect information and to draft a report and recommendations to CAS AGM 2015 with

- potential Congress **venues** and services
- **accommodation** (hotels, university residences, etc.)
- **technical support**: website, online registration, program book and abstracts publication
- **best practices**: advice, do's and don'ts
- 5-year **timetable**
- **budget** estimate
- advice on professional **fundraisers and sponsors**
- financial accountability guidelines

Composition

Andrii Krawchuk, Chair – Professor – Religious Studies, University of Sudbury; CAS member, (representative to ICCEES, 2009–).

David Schimmelpenninck – Professor – History, Brick University; CAS member.

Maxim Tarnawsky – Professor – Slavic Languages and Literatures, UofT; CAS member (secretary-treasurer, 1992-8).

Tristan Landry – Professor – History of Contemporary Europe, Université de Sherbrooke; CAS member.

Daria Dyakonova – Ph.D. student (History, Université de Montréal); CAS member; paper at Brock meeting 2014.

Katie Rose – Ph.D. student (Slavic Languages and Literatures, Harvard); in Montreal; CAS member.

Janick Roy – CAS member; studied Russian literature at UofT; (Laurentians – 1 hour from Montreal).

Many others provided valuable consultation and advice, including Kimitaka Matsuzato (Makuhari Congress, 2015), Petter Stålenheim (ICCEES Stockholm Congress 2010), Thomas Bremer and Heike Doerrenbaecher (Berlin Congress 2005), Stan Kirschbaum (past CAS rep to ICCEES) and local professional convention organizers (PCO's) in Montreal and Toronto.

2. The PWG's Original Timetable

30 May 2015 – Report and Recommendations presented at CAS AGM

15 Apr 2015 – Report and Recommendations submitted electronically to CAS

- 5 Mar 2015 – First Draft of Report reviewed by PWG
- feedback, comments from members
 - final changes, corrections entered
- 5 Feb 2015 – Drafts submitted to Chair; compilation/harmonization of material
- 5 Dec 2014 – Meeting #3: All relevant information collected –**
- venues
 - accommodation
 - technical support
 - best practices
- 5-year timetable
 - budget estimate
 - fundraisers, sponsors
- >> begin drafting sections of Report: summaries, comparative charts, recommendations
- >> start on financial accountability guidelines (from existing information)
- >> any other elements to the Report (eg., overview of Slavic/East European Studies in Montreal area)
- 27 Oct 2014 – all PWG Member feedback (Meeting #2) submitted
- 24 Oct 2014 – Meeting #2: Review of Progress, any questions**
- 22 Sept 2014 – all PWG Member feedback (Meeting #1) submitted:
- confirmation of availability
 - responses to questions
 - distribution of tasks confirmed
- 19 Sept 2014 – Meeting #1: Distribution of tasks, any questions**
- IN MONTREAL:
- potential Congress venues
 - accommodation services (hotels, university residences, etc.)
 - technical support: website, online registration, program book and abstracts publication
 - best practices: advice, do's and don'ts from organizers of past Congresses in Montreal (on all of the above). For example, Humanities Congress at Concordia in 2010.
- FROM ICCEES:
- 5-year timetable for the Congress Planning Committee
 - budget estimate (from past ICCEES Congresses and Montreal info)
 - professional fundraisers, sponsors

3. The Report

PWG Meetings

Appendix 6.1 summarizes PWG meeting agendas, the chronology of our work and our collection of information.

Potential Venues and Accommodation

Two bid books (Montreal and Toronto) provide preliminary information on venues and accommodation, as well as other related information. Any questions will be answered by the PWG Chair during the presentation to the CAS AGM.

The Toronto bid was not solicited, but came in the form of an expression of interest to CAS President Elena Baraban. She shared the message with the PWG, and we continued the conversation, which turned into a full-fledged bid. The unsolicited Toronto bid is very well prepared and the PWG acknowledges that there is merit in giving it serious consideration. However, in the end our motion is that the original plan to go with Montreal as the venue for the World Congress. **(Why not Toronto?)** If possible, the Toronto bid should be retained for one year as a fall-back option.

Technical Support

In both of the bids that were received, technical support is subsumed under the services provided by a Professional Convention Organizer (PCO). To reduce costs, the PWG strongly recommends that the Organizing Committee explore the possibility of technical support from a co-sponsoring university.

Best practices

While the logistics of World Congresses are shaped to some extent by the context, particularities and standard practices of each respective country, valuable advice is available to us from past organizers. Through ICCEES, we have the benefit of experience-based insights and advice from international colleagues who organized Berlin 2005, Stockholm 2010 and Makuhari 2015. In addition to tried and true practices for basic organizational work, this valuable connection can be useful to the OC in attending to the global scope of ICCEES members and Congress participants, their needs and expectations. The chief organizers of each of the above three Congresses have provided valuable advice and are willing to continue advising the OC as needed.

Several of the Montreal scholars in Central and East European Studies have organizational experience with academic congresses, while others have extensive administrative experience.

5-Year Timetable for the Organizing Committee

The OC should review the suggestions from past ICCEES World Congress organizers (Appendix 6.5) and design its own five-year plan for Congress 2020. Ongoing consultation with ICCEES is available, and on-site contacts should be developed with people who have professional expertise in the organization and operation of academic conferences.

Budget estimates

- We have obtained a number of projections, which vary depending on the assumptions embedded within them. The budgets in the bid books are "conservative," that is, they are based on conservative estimates of revenues, and more generous estimates of expenditures. These "rough-and-ready" projections are based on higher-end venue options like Convention Centres and hotels, but still allow for cost-cutting should the need arise. Perhaps their greatest utility is to provide the OC with a ball-park idea of the *proportionate revenues and expenses* that may be expected.

- While similar budgetary charts are available from past ICCEES World Congresses (for Stockholm, see Appendix 6.2), ultimately past Congresses, OC's and countries reflect their own specific contexts and organizational, legal, and financial realities. For example, fund-raising possibilities in one country may not be exactly the same as those in another. Again, their primary utility for us is in the *proportional (%) values*, which can provide a constructive orientation for planning.

- Although the PCO's who drafted the two bids highlighted the local Convention Centres in the first place, our findings suggest that, from budgetary and other organizational considerations, the preferred way to go is with a university. In addition to savings on venue rental, any additional services available through a university (website design and construction, online registration system, publication of program and abstracts, on-site student volunteers) could represent substantial savings as compared with other routes.

Financial Guidelines

- CAS will bear no financial responsibility for the event, while ICCEES can provide coverage (up to 50,000 Eur) in the event of catastrophic cancellation.

- Upon completion of the event, in case of a surplus ICCEES shall receive \$10 per registered participant. Any remaining funds will go to CAS to support its activities and travel support to students.

- The Organizing Committee (OC) should be incorporated in Quebec. In addition to protection from personal financial responsibility for catastrophic cancellation, the province provides a rebate on tax paid for goods and services (100% on convention facilities: meeting rooms, exhibition space and supplies; 50% on catered food and beverages) to incorporated entities upon completion of congresses with 75% out-of province participation.

- As much as possible, internal OC communications will be conducted via e-mail or Skype. However, some meetings and business may be necessary in person and on site. As it is not assumed that the voluntary work on the OC should entail out-of-pocket expenditures by its members, any travel expenses directly related to the work of the OC will be covered by the Congress budget insofar as possible.

- Given the tight budget, and the desirability of attracting high-profile keynote speakers and funding support for student participants, the OC should actively explore the possibilities of public and private sponsorships for the Congress.
- Accountability: the OC's budget and financial operations will be subject to review by CAS or external audit, as may be required.

4. Recommendations (Motions) to CAS AGM 2015

Since CAS decisions proceeding from this report must be formally transmitted to ICCEES, we have formulated our recommendations as a set of motions. The CAS Executive will have advance access to the material, and the report will be presented to the CAS AGM 2015, followed by questions, discussion and a vote on the following motions:

1. Following up on CAS AGM 2014, which sent an expression of interest to the Executive of ICCEES to host and assist with organizing the X ICCEES World Congress in 2020 in Montreal; subsequent to the decision of the Executive of ICCEES to accept the Canadian proposal; and in light of the information gathered by the Preliminary Working Group

MOTION #1: that CAS confirm the Canadian offer to host the X ICCEES World Congress in 2020.

If carried, notice of this motion will be transmitted to the Board of ICCEES with a request for their letter, formally confirming their acceptance of the Canadian proposal to host the Congress. CAS to send a copy of this letter and its own letter to the incorporated Organizing Committee, giving it the mandate to plan the Congress on behalf of CAS.

2. Based on CAS' original expression of interest to the Executive of ICCEES with Montreal as the proposed Congress venue, the ICCEES Executive's positive response, based on the bids received by the PWG including information on scholars in Montreal, and considering the Montreal financial incentives (up to \$73,000 based on Congress registration),

MOTION #2: that the Congress venue be Montreal, 3-8 August, 2020 (or: 27 July – 1 August), and that the competitive Toronto bid be "kept alive" for one year as a fall-back option.

3. Subsequent to the anticipated positive decision by the ICCEES Board in August 2015 to ratify and formally accept the Canadian proposal,

MOTION #3: that a local "Organizing Committee (OC) – ICCEES 10th World Congress 2020" be convened and chaired by a member of the ICCEES Executive and Board to plan, organize and see the event through to completion.

4. MOTION #4: that the OC be guided in its work by the recommendations contained in this report of the PWG, in particular –

4.1 Make every effort to ensure that the World Congress is held at a university. Despite the centralized convenience of Convention Centres, holding the Congress at a university would represent significantly lower expenditures. The CFHSS always holds its congresses on campuses: a strong indicator that this model is also the preferred one for our World Congress.

4.2 Recruit McGill and Concordia Professors (especially current CAS members) to the OC for personal, on-site liaison as employees of the universities.

4.3 Follow up with the contact persons at McGill and Concordia responsible for meetings, and determine whether a university co-sponsorship along the lines of the Humanities Congress is feasible, ideally covering: reserved meeting, plenary and reception spaces; reserved residence accommodations; student volunteers and (cost-shared) technical assistance with website, program book, abstracts book, etc.

4.4 Report with updates to the executives of CAS and ICCEES annually or as needed.

4.5 Incorporate the OC in Quebec to protect against catastrophic cancellation. In addition, incorporated entities that have organized and held Congresses with 75% out-of province participation are eligible for a provincial rebate on tax paid for goods and services (100% on convention facilities: meeting rooms, exhibition space and supplies; 50% on catered food and beverages).

4.6 Over and above the funding of basic operations through registrations, the OC would be well advised to have a fund-raising subcommittee to focus on potential sources of public and private support and/or sponsorship to address important ancillary matters such as student travel assistance and attracting world-class keynote speakers.

5. MOTION #5: to acknowledge receipt of this Report and Recommendations and to dissolve the PWG.

5. Acknowledgments

Thanks to the members of the Preliminary Working Group, especially Maxim Tarnawsky, Janick Roy, Tristan Landry – and to Petter Stålenheim (Stockholm) – all were particularly generous with their time. Without their input this report would not have been possible.

6. List of Appendices

An integral part of this report, these materials provide a snapshot of information, advice and professional expertise that have been collected thus far, and of sources that will remain useful in the further planning stages of ICCEES Congress 2020 in Montreal.

6.1 PWG Meeting Agendas: 19 Sept, 24 Oct, and 5 Dec 2014

6.2 Petter Stålenheim correspondence: Stockholm 2010 budget and questions

6.3 Chart: FT Faculty with Central and Eastern Europe Focus at Montreal and Québec Universities

6.4 List of Montréal and Québec Scholars in Central and East European Studies

6.5 Two 5-Year Timetables (from Berlin 2005 and Makuhari 2015)

6.6 MONTREAL BID

6.7 TORONTO BID