**BCS IRMA**

**Events Organiser**

**Standard Operating Procedure (SOP)**

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| Responsible Body | BCS IRMA Events | | |
| Version Number | 5.6 | | |
| Prepared by | Zuzana Bitterova | | |
| Date Approved |  | | |
| Date Issued | 16/07/18 | | |
| Date Reviewed | 11/06/20 | | |
| **Summary Of Revisions Made** | | **Version** | **Date** |
| Updated for MC 21/02/19 | | 5.3 | 21/02/19 |
| Updated for MC 12/12/19 | | 5.4 | 12/12/19 |
| Updated for MC 26/03/20 | | 5.5 | 20/03/20 |
| Updated for MC 11/06/20 | | 5.6 | 11/06/20 |
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# INTRODUCTION

The role of the Events Coordinator is to deliver annually a season of interesting and relevant events to the BCS Information Risk Management and Assurance (IRMA) Specialist Group. Most events will take the form of a presentation (either by an IRMA member or by an invited external speaker), followed by questions and answers, then refreshments and networking.

Most of these events are held in the BCS London Conference Centre, although opportunities to hold events elsewhere are always of interest. The role comprises the following components:

* Liaison with BCS HQ and other Specialist Groups about the events;
* Budgeting;
* Venue booking;
* Speaker engagement;
* Informing the membership of the event;
* Tracking event bookings;
* Booking refreshments;
* Preparing the attendance list;
* Event Administration;
* Informing the membership that the recording is available;
* Dealing with speaker expenses and gift;
* Preparing an Event management report for the committee;
* Maintaining this Standard Operating Procedure and Risk Register.

# TIME REQUIRED

The time required varies throughout the year:

**June to July:** Sending out email to members asking for expression of interest in speaking, and dealing with responses, takes about 20 hours spread over the two months.

**September to July:** Organising and chairing each monthly event takes approximately 6 hours per month, most of which relates to preparation for, attending the event, and follow-up.

**Quarterly:** For each IRMA Committee Meeting, each events governance document needs to be reviewed and updated. This takes approximately 4 hours per quarter.

# LIAISION WITH BCS HEADQUARTERS

Co-ordination with BCS HQ is usually through BCS Member Groups [groups@hq.bcs.org.uk](mailto:groups@hq.bcs.org.uk). On occasions, it may be necessary to liaise with the BCS London office [bcs\_london@hq.bcs.org.uk](mailto:bcs_london@hq.bcs.org.uk). The valuable help provided by the BCS support staff cannot be overstressed; they are the first point of contact for any queries.

# LIAISION WITH OTHER SPECIALIST GROUPS

From time to time, where there are topics of shared interest with other Specialist Groups and Branches, it is important to ensure they are informed as appropriate.

# EVENT BUDGETING

The current meeting budget is set at £80 per meeting[[1]](#footnote-1) to cover refreshments and speaker expenses. With 11 meetings a year this equates to £880. Most speakers do not claim expenses. The room is provided by the BCS at no charge.

# VENUE BOOKING

We have a standing arrangement with BCS Member Groups for the rolling advance booking for a year ahead (excluding August) of a room at BCS London office. This request is for the second Tuesday in each month as it tends not to clash with meetings held by other professional associations. This is not always possible, and it may be necessary to use another day in the second week, or perhaps even in the third week. The only requirement regarding the advance booking is to formally ask BCS Member Groups to continue to do so at the start of a new season.

Each BCS room can accommodate various number of people - up to 80 people if rooms are merged (subject of availability).

The BCS provisional event booking form also enables us to request:

* Panopto
* 1 x Lapel Microphone for PA System and recording
* 1 x Hand-held Microphone for PA System and recording
* 2 x Laptops
* 1 x LCD Projector (dependant on size of room and number of screens)
* 1 x Panasonic Camcorder & Tripod

For all events/ meetings, names of guests and members attending, and AV and catering requirements should be submitted by Wednesday the week before the event. A member of the Facilities Team will contact the Events Coordinator the same week to check all details and answer any possible queries to finalise the event. This is required to ensure all events are fully supported and the BCS team is resourced appropriately. Member Groups will prepare a preliminary room booking form for each event which forms the basis of the [final booking](#_EXAMPLE_EVENT_BOOKING) form which is prepared a few days before a meeting.

# EVENTS PROCESS

A summary of the Events Process follows. It lists responsibilities specifically for Events, and also for others in the chain.



Figure - Events Process

## 05.1 – Build Draft Events List

* June (July-August if pushed).
* Circulate to IRMA Management Committee (MC) a potential list of topics to focus on for the forthcoming season.
* Agree priority topics at the June MC meeting.
* Establish a list of members and others previously indicating a wish to speak – select any/all fitting the priority list.
* Liaise with already engaged speakers for specific event slots.
* Send an email “Call for Speakers” to IRMA Members, with available dates identified and with priority topics identified.
* Populate Draft Events List with potential speakers.
* Update Basecamp Schedule.

## 05.2 – Venue & Arrangements

* Confirm rolling venue bookings for the season with Member Groups (MG).
* Update Basecamp Schedule if any changes.
* Confirm general catering requirements for the season.

## 05.3 – Complete Booking of Speaker

* Generate formal IRMA Speaker Invitation, including:
  + (empty) “Flyer” to each speaker for completion. Include “Recording Waiver” for signature;
  + Conditions about commercialization;
  + Presentation to be brought on memory stick;
  + Offer of expenses and gift, including request for postal address.
* On reply, check/re-work Flyer with speaker.
  + Send Gift Request to MG.
* Send Draft Flyer to MG to:
  + Pass to Eventbrite to register event and get booking details;
  + MG to fill in missing parts of Draft Flyer and pass back to Events;
  + MG to forward completed flyer to BCS Web Team to update BCS Events;

## 05.4 – Update Events Information

* Update Events List on Basecamp.
* Update Schedule on Basecamp.
* Send Completed Flyer to IRMA Webmaster to update IRMA Web.
* Send Completed Flyer to Communications for:
  + Updating LinkedIn;
  + Transmission to members.
* Communications to track bookings and send reminder if necessary.

## 05.5 – Generate Events Handouts

* List of forthcoming events.
* Flyer for next event.

## 05.6 – Coordinate Event

* Track delegate bookings:
  + Take appropriate action for over/under-subscription;
* Confirm booking with London and confirm refreshments order.
* Prepare attendance/sign-in list.
* Prepare any relevant handouts:
  + Arrange for copying in London.
* Instruct attendees to printout name badge upon arrival.
* At event:
  + Welcome delegates;
  + Ensure attendance/sign-in list is filled in and recovered at the end of the event;
  + Housekeeping;
  + Speaker introduction;
  + Chair after-presentation discussion;
  + Closure and thanks.
* Ensure speaker has claimed/received and expenses and has received gift.

## 05.7 –Event Follow-up

* Webmaster to inform members (not just attendees) that recording is available.
* Liaise with Communications to publish a summary on LinkedIn to try to stimulate discussion.
* Analyse all feedback from event and summarise.
* For each Management Committee Meeting:
  + Produce a quarterly report of events last quarter, highlighting successes and learning points;
  + Review SOP (and Events Process), RR, DOI & DOU.

# PROCESS DETAILS

## 05.3 – SPEAKER ENGAGEMENT

Once we have the dates for the forthcoming season, IRMA members are emailed (See for details) using the member circulation list [irmamem@lists.bcs.org.uk](mailto:irmamem@lists.bcs.org.uk)[[2]](#footnote-2) asking if any members wish to speak at one of our events, and, if so, their preferred date from those provided. This is usually in May/June of each year for the season that will commence in September. An example of the information that is required from potential speakers (in the form of the advertising flyer which will be sent to members in the event of the speaker being selected) will be included with the request. (See Appendix 2: Example “Session Description” (Flyer).) This should also be sent to any general enquirers requesting to speak.

Note that in the invitation email it is stressed that the presentation must not be overly commercial; the event will be recorded; and that they will be asked to complete a recording waiver form. If they object to any of this, then we must regretfully decline the offer.

During the year we often receive requests from people who wish to speak at one of our events. Always ask them to prepare a session description form (as above) to enable a decision to be made.

Once accepted a speaker must complete the recoding waiver form (see Appendix 4: Speaker Recording Waiver Form) and be told to bring their presentation on a memory stick, as we will be using a BCS laptop with the Panopto software which enables us to synchronise their slides with the recording of their presentation.

## 05.4 – INFORMING MEMBERS OF AN EVENT

This is in two stages. The first stage is to send a simple list of all forthcoming events giving the date, event title and speaker name (where already known) to [irmamem@lists.bcs.org.uk](mailto:irmamem@lists.bcs.org.uk) so that members can populate their diaries. This list is also sent to the IRMA Communications Secretary for distribution via LinkedIn, and to Member Groups so that they can create appropriate events in the BCS Events system. If we have the full event details available in the form of the advertising flyers, then we will submit these to Member Groups at the same time so that they can populate the event details.

The second stage is sending our members the advertising flyer for the forthcoming event. There is a standing arrangement with Member Groups that they will open an event for booking three weeks before the event. They will inform us when the booking system is open and provide the relevant link. This is used to update the “second page” of the flyer (see “***Appendix 3: Selected Additional Event Information to add to Flyer***” for draft details). Details of the event with the booking link are distributed to our members but the Communications Secretary. Note, it is important that the link be tested.

Please note that the attachment is in PDF format while the free text of the detail is included in the main message. This is so that members can read the details on mobile devices.

## TRACKING DELEGATE BOOKINGS

BCS MG provide regular updates in the week running up to the event regarding the number of delegates that are currently booked and expected attendance based on past turnout (percentage of actual attendees versus number of attendees that booked).

Booking status can be checked at any time by logging onto the BCS web site, going to the Member Area and then selecting Event Reports. Select the event and then click on the Run Report button. The report will be generated within a few minutes. It can be exported to Excel if required. NOTE: Any exports containing personal data must be stored on an encrypted drive.

## BOOKING REFRESHEMENTS

There is a standing arrangement with Member Groups and the London Office for the refreshment order (see Appendix 8: Standard Refreshment Order) which is suitable for around 25 members. This is managed by London HQ office, but can be adjusted based on mutual agreement. If we have a full-house, then the order is increased accordingly. Note, as a general rule, at least one-third of those who have booked will not attend. On this basis no notice is taken of any special dietary requirements as we cover most requirements in our standard refreshment order (vegetarian, fish & meat).

In any case, we need to confirm with [bcs\_london@bcs.uk](mailto:bcs_london@bcs.uk) what changes we would like to make to the catering order to take into account the numbers. The London Team will liaise with the caterer and they will ask Member Groups to raise a Purchase Order for the cost of the catering. The initial order will need to be made at least a week before the event and changes can be made up to 48 hours before the event date.

The standing request is that the refreshments need to be made available after the talk. However, tea, coffee and biscuits can be provided before and during the session, available from 18:00 onwards so that people who come directly from work can have something to keep them going during the event.

## PREPARING THE ATTENDANCE LIST

Although the BCS retain a record of attendees we have always prepared our own from information provided by Member Groups on the Friday/Monday before the meeting. At the event we ask the attendees to sign the sheet which is retained as evidence of attendance.

The spreadsheet provided by Member Groups is used, and an appropriate heading is added. All columns except Given Name and Surname are deleted and an additional column titled ‘attendance’ is added to tick attendance. Generally, this is printed locally and taken to the meeting, or, if the Events Coordinator cannot make the meeting, the London office is asked to print it and make it available to the meeting chair.

BCS London requires a copy of the speaker’s recording waiver before the event.

## 05.6 – EVENT ADMINISTRATION ON THE DAY

Member Groups will send name badges to London which need to be laid out on a table outside of the meeting room.

The meeting room will be prepared by the BCS London team based on the requirements from the event booking form. The Events’ coordinator will liaise with BCS London AV experts to ensure all the kit is working properly.

The speaker will have previously been informed that the event will be recorded and that they should bring their presentation on a memory stick so that it can be loaded onto a BCS laptop running the Panopto software. Our Communications Secretary will arrange to get the speaker setup with microphone, to arrange for the operation of the actual recording equipment and for the editing of the recording and getting it loaded onto our web site.

The handheld microphone is required to enable the meeting chair to:

* welcome attendees;
* announce arrangements for action in the event of a fire, toilet locations, refreshments; and to note that video and slides to be available on Panopto within one week of the event;
* introduce the speaker;
* (using an appointed runner) ensure the attendees can be recorded during the question and answer session;
* thank the speaker for the presentation (and instigate a round of applause!).

## 05.7 – EVENT ADMINISTRATION AFTER THE DAY

The Events Coordinator will liaise with the Communication Secretary to publish a post on LinkedIn to encourage conversation about the topic.

## INFORMING THE MEMBERSHIP THAT THE RECORDING IS AVAILABLE

Once the Webmaster has informed that the recording in on the web site, the Communications Secretary will test the link and if everything is okay, email the membership that it is available for viewing. The Communications Secretary will publish the notice on the LinkedIn group.

# SPEAKER EXPENSES & GIFTS

If the speaker requests expenses re-imbursement, then they are asked to complete the standard BCS expenses claim form which, after approval, is sent to our Treasurer for processing.

We are allowed to give our speakers a small gift which does not come from our budget. A draft text is given at “Appendix 7: Example “Gift for Speakers” (Email)”.

When the speaker responds the request is forwarded to BCS Member Groups ([groups@hq.bcs.org.uk](mailto:groups@hq.bcs.org.uk)) and they are asked to deal with it.

# EVENTS SOP, RISK REGISTER and BSC

The versions of the Events SOP and RR on Basecamp are to be reviewed prior to each committee meeting. The ‘Effective’ date of the SOP is to be amended (even if there are no changes) and the RR is to have its ‘Date Reviewed’ column updated (even if no changes). Both documents are to be uploaded to the relevant Basecamp directory using the agreed version control procedure.

Similarly, the IRMA Balanced Score Card will be reviewed prior to each committee meeting and the targets relevant to Events will be reviewed against this SOP.

***Appendix 1: Example “Call for Speakers” (Email)***

**Subject:** BCS IRMA – Call for Speakers – London

Dear IRMA Colleague,

We are looking for speakers for our September 20xx to July 20xx meetings which will be held on the second Tuesday of each month at the BCS London office.

Your presentation must not be overly commercial, although you may use two slides to introduce yourself and your company. All sessions will be recorded for subsequent viewing by IRMA members and the general public on our web site and you will be required to sign the standard BCS recording waiver to that effect.

If you have something that you would like to share with your colleagues, please complete a proposal based on the attached template and return it to me for consideration. If you would like a specific date, please let me know.

Many thanks.

Kind regards.

<Events Coordinator>

***Appendix 2: Example “Session Description” (Flyer)***

***Presentation Title***

***Sub-title***

**Tuesday ddth Month 20xx**

18:00 Registration

18:30 Presentation

19:30 Networking Session (with refreshments)

BCS – The Chartered Institute for IT

25 Copthall Ave, London EC2R 7BP

**Speaker: <Your name>,** <Your job title>, <Your employer>

**Event Details:** <description of topic area and presentation objectives>

**Speaker Profile:** <short history of your professional experience relevant to the field of information risk management and assurance citing any contributions to the industry, publications, etc. You can also include links to your professional social media profiles such as LinkedIn and Twitter.>

***Appendix 3: Selected Additional Event Information to add to Flyer***

**Cost:** Free to attend BCS and ISACA members, and guests.

**Book Online:** <insert booking information from Member Groups>

Closing date for bookings is 0830 on <closing date>. No more bookings will be taken after this time.

**CPD Credits:** This event counts for two hours towards your CPD. More information available at [www.bcs.org/cpd](http://www.bcs.org/cpd).

**Event Recording:** Whenever possible events will be recorded and loaded onto the BCS web site and the BCS Panopto channel (<https://bcs.cloud.panopto.eu>) for subsequent viewing by IRMA members and the general public, in order to meet the Institute’s Royal Charter commitments.

**Special Dietary Requirements:** Our standard food & refreshment order covers all dietary needs.

**Feedback:** Attendees will receive an e-mail following the event inviting their feedback. You can also let us know what you think about BCS IRMA services: our website, events topics, videos, et. at <https://forms.bcs.org/bcs/irma-feedback/>

**London Meeting Dates for your calendar – 2019-20:** <list of dates>

**Contact**: If you have any queries about this event, please email [events.irma@bcs.org.uk](mailto:events.irma@bcs.org.uk)

***Appendix 4: Speaker Recording Waiver Form***

**Licence to Use**

In order to make use of your presentation we, the British Computer Society (“BCS”), need your agreement in writing. Please take a moment to read the terms of this licence, sign where indicated and return it to us as quickly as possible.

|  |  |
| --- | --- |
| **Title of Presentation** |  |
| **Name(s) of Presenter(s) (the “Presenter(s)”)** |  |
|  |
|  |
| **Name and Address of Copyright Owner, if not as above** |  |

* By signing this form, the Presenter(s) agree to grant to BCS the non-exclusive right to record, reproduce, distribute, translate or otherwise use their presentation(s) (including the abstracts) (the “Material”) throughout the world in printed, electronic or any other form and in turn to authorise others to do the same.
* The Presenter(s) agree that BCS may publish the Material on the BCS website, and that BCS may use it on its own, or with other related material. In order to do so, BCS may edit the Material, but only as necessary. Where material changes may be required BCS will seek your permission to do so.
* The Presenter(s) warrant that:

a) the Material is their original work; or

b) if it contains material which is a third party’s copyright, that the Presenter(s) have obtained the unrestricted permission of the copyright owner (the “Third Party Copyright Owner”) (please attach evidence of this) and that the material is clearly identified and acknowledged within the text. The Presenter(s) also warrant that the Material does not contain anything which is libellous, defamatory, obscene, blasphemous or illegal, or infringes anyone’s copyright or other rights. Where statements are made purporting to be facts the Presenter(s) warrant that, to the best of their knowledge and belief, these are true.

* The Presenter(s) and any Third Party Copyright Owners assert their moral right to be identified as the author. BCS will make sure that the name(s) of the Presenter(s) and/or Third Party Copyright Owners is/are always clearly associated with the presentation and, while the Presenter(s) do allow us to make necessary editorial changes, BCS will not make any substantial alterations to the Presenter(s) presentation without consultation. BCS will undertake to publish as soon as reasonably possible. BCS will do everything it reasonably can to maximise the visibility of the presentation of the Presenter(s).
* Copyright remains with the Presenter(s) or Third Party Copyright Owner(s) (as appropriate), and BCS will acknowledge this in the copyright line which appears on the presentation(s). The Presenter(s) authorise BCS to act on their behalf to defend their copyright if anyone should infringe it, and to retain half of any damages awarded (after deducting BCS’s costs). The Presenter(s) also retain the right to use their own presentation in the following ways, as long as they do not sell it or give it away in ways which would conflict directly with BCS’s commercial business interests:
* for the internal purposes of the Presenter(s) institution or company;
* mounted on the website of the Presenter(s) or their institution in whole or in part, as the basis for their further publications or spoken presentations.
* This agreement shall be governed by English law and the Presenter(s) agree to submit to the non-exclusive jurisdiction of the English Courts.

|  |  |
| --- | --- |
| **Signature(s) of Presenter(s)** | **Date** |
|  |  |
|  |  |
|  |  |
|  |  |

*Note: every named author must sign this form, or a copy of it*

|  |  |
| --- | --- |
| **Signature of Third Party Copyright Owner, if different** | **Date** |
|  |  |

|  |  |
| --- | --- |
| Please return this form by email to:  The BCS IRMA Events’ Coordinator [events.irma@bcs.org.uk](mailto:events.irma@bcs.org.uk) and copy to BCS Member Groups [groups@hq.bcs.org.uk](mailto:groups@hq.bcs.org.uk) | Alternatively, you may post a copy to:  BCS First Floor, Block D North Star House North Star Avenue Swindon SN2 1FA |

***Appendix 5: Example “Initial List of Events to Members” (Email)***

**Subject:** BCS IRMA – Initial List of Events – London

Dear IRMA Colleague,

Please find attached and below our anticipated programme of events for September 2019 through to July 2020. All meetings are on the second Tuesday of each month, unless otherwise stated. All the events will be held at the BCS offices at 25 Copthall Ave, London EC2R 7BP. Registration will commence at 18:00 with light refreshments followed by the presentation at 18:30 for 60 minutes.

You will receive separate notification of each event when registration is open, which will be about three weeks beforehand.

As usual, we will attempt to record every event for subsequent viewing by those who cannot physically attend.

**BCS IRMA Programme – 2019/2020**

<list of events>

Kind regards.

<Events’ Coordinator>

***Appendix 6: Example “Booking Now Open” (Email)***

**Subject:** BCS IRMA – Booking Now Open – <Date> – London

Dear IRMA Colleague,

Booking is now open for our <date> event at <booking URL>

Details are attached.

The presentation material from our dd mmm event, “<name>” is available in our secure members area. I will let you know when the associated video recording is available.

Kind regards.

<Events’ Coordinator>

<insert final flyer information>

***Appendix 7: Example “Gift for Speakers” (Email)***

**Subject:** BCS IRMA – Gift for Speaker

Dear <speaker>,

Many thanks for agreeing to speak to the BCS IRMA Specialist Group.

As we have already discussed, we can pay basic travelling expenses for your trip to BCS London – let me know on the night and we will complete a BCS Expense form.

Further, we would like to offer you a small gift for your presentation to IRMA, viz. one of the books from the BCS catalogue which you can find at <http://shop.bcs.org/>

Please let me know what you would like and let me have your postal address please.

Kind regards.

<Events’ Coordinator>

***Appendix 8: Standard Refreshment Order***

* 20 sandwich platters from Exeter Street café
* Vistasur sauvignon blanc x 2
* Luis Felipe Edwards merlot x 2

1. Agreed at Management Committee Meeting, Thursday 21st June 2018 [↑](#footnote-ref-1)
2. This list contains the emails of all IRMA members. It is automatically updated by the BCS membership system. [↑](#footnote-ref-2)