Volunteer Leadership Handbook

Introduction

This handbook is intended for leaders in the American Institute for Conservation (AIC) and the Foundation for Advancement in Conservation (FAIC).

AIC is the association for conservation and preservation professionals. Member dues, meeting registrations, and advertising revenue provide the majority of its income. FAIC is an endowed charitable scientific non-profit that the association created in order to to receive grants and fund various programs. Donations to the foundation's general fund support operating costs, which are rarely covered by grants. The two organizations have a symbiotic relationship and work closely together.

As a volunteer leader, you are a member in good standing. You should be aware of the **basic structure** of the organizations, our **calendar**, our **code of conduct**, and your **responsibilities** in your chosen role. Staff liaisons are here to guide you in administrative and technical areas, and board liaisons can share the overall direction of the organization as well as bring items directly to the board from your group.

Calendar Overview

Winter	Spring	Summer	Fall
January ● Fiscal Year Begins ● Volunteer Openings Posted ● Meeting Program Finalized	**April** ● Elections Held	**July** ● Workshop, FAIC Event Planning Deadline	**October** ● Budget Feedback Due ● Annual Meeting Abstract Reviews
February ● Year-end Financial Reports Review ● Volunteer Applications open ● Award Nominations Due	**May** ● Annual Meeting ● Business Meetings	**August** ● Board Meetings ● Upcoming Budget Prepared	**November** ● Internal Advisory Group Meeting (Nov or Dec) ● Annual Meeting Program Published
March ● Election Ballot Finalized ● Audit to finalize financials for business meeting	**June** ● New Leader Orientation ● Terms Begin ● Upcoming Call for Papers Developed	**September** ● Abstracts Deadline ● Budget Proposals Due ● Membership Renewals Begin	**December** ● Fiscal Year Ends on 31st ● Internal Advisory Group Meeting (Nov or Dec) ● Grant/Funding & Speaker Stipend Applications Due

Governance

Organizational Chart

[Download the pdf.](#)

American Institute for Conservation — Preserving Cultural Heritage

Group, Network, and Committee Organizational Chart

Specialty Groups
- Architecture
- Book & Paper
  - Art on Paper Discussion Group
  - Library & Archives Discussion Group
- Conservators in Private Practice
- Electronic Media
- Objects
- Paintings
- Photographic Materials
- Research & Technical Studies
  - Imaging Working Group and Forum
  - Laser Discussion Group
- Textiles
- Wooden Artifacts

Many specialty groups and networks have publication, nomination, and program planning committees, and other organizational subgroups.

Networks
- Archaeological Heritage Network
- Contemporary Art Network
- Emerging Conservation Professionals Network
  - Emerging Conservation Professionals Forum
- Health & Safety Network
  - Health & Safety Network Forum
- Preventive Care Network
  - Materials Selection and Specification Working Group (MWG)
  - Microfading Tester International Discussion Group

Board Appointed Committees
- Audit Committee
- Awards Committee
- Bylaws Committee
- Communications Committee
  - Conference Proceedings, Publications, Outreach, Education Outreach (K-12) Subcommittees & Wiki Working Group
- Education & Training Committee
- Emergency Committee
- Equity & Inclusion Committee
- Financial Advisory Committee
- Program Committee
  - Poster Committee
- Sustainability Committee

Standing Committees
- Ethics & Standards Committee
- Appeals Committee
- Nominating Committee
- Membership Committee
  - Member Engagement Subcommittee

Every group, network, and committee has both a board liaison and at least one staff liaison.

culturalheritage.org

Types of Groups

Our website has more information about our groups, networks, and committees. Groups may choose to disband if interest is low, or merge with another group if interests overlap.

Bylaws and Board Initiated Groups

Committees are charged by the board of directors with specific duties that execute association business. Our bylaws name specific standing committees that execute essential association business. The Board of Directors also creates other committees to address certain issues in the

field. The board confirms leaders for each committee, typically after an open call. Committees may have subcommittees.

Task Forces are small groups that focus on one narrow topic, either short-term or long-term in scope. These may transition over time to a committee or network. Task forces are formed by the board for a short-term, discrete purpose and when that task is complete and recommendations submitted, the task force is retired.

For example, a task force may be called to review a certain document, such as the Ethics Core Documents Review Task Force, or write a document, such as the Contested Monuments position paper.

Member Initiated Groups

Membership Groups are subgroups that focus on a particular specialty or topic. We have two types of membership groups: specialty groups and networks. Specialty Groups focus on one set of materials or techniques in which people have expertise. Networks focus on topics that may be of interest to any member regardless of specialty.

- Specialty Groups and some Networks require additional dues.
- Students can join any for free.
- All members can join the Emerging Conservation Professionals Network, Health and Safety Network, and Preventive Care Network for free.
- Groups that collect dues will hold elections for officers, if roles are contested, and an annual business meeting. For dues-collecting groups, elected officer roles named in the Rules of Order are voted on in the general election by group members with voting rights.

Working Groups are subgroups of a network, specialty group, committee, or task force that focus on one specific task (or series of tasks). Once the task(s) are complete, the working group disbands. A working group may include non-members. A working group must have AIC members as its core group of officers. Working groups do not collect dues or have a designated budget; they must work with their parent group for any budgetary requests.

Two examples are the Imaging Working Group, which plans annual meeting programming and is developing a wiki section, and the Materials Working Group, which hosts an annual event and creates and develops material testing methods and data.

Discussion Groups are subgroups of a network, specialty group, committee, or task force that offer group members the opportunity to converse on a specific topic. A discussion group may be formed for a finite period or continue as long as interest in the topic remains. Discussion groups may transition over time to a committee or network. A discussion group may be formed if the scope is narrow or limited to a smaller group of people and may include non-members. They must have AIC members as their core group of officers. Discussion groups do not collect dues or have a designated budget; they must work with their parent group for any budgetary requests.

Creating Groups

Inform Leadership

Members interested in creating a discussion group or working group should start by discussing it with the potential parent group. If no obvious parent group exists, they may discuss it with the Executive Director. Members interested in starting a specialty group or network should start by discussing it with the Executive Director and the Board Director - Specialty Groups and Networks.

Investigation

Interested members should then draft a list of potential officers and create a survey to be distributed through our communications channels to gauge interest from other members. After they review the survey data, the group can decide to submit a formal board request.

Group Charge

A draft charge can be shared with the staff liaison who in turn will share with the Executive Director and other staff for review.

Submit a Formal Board Request

Members should send a letter of request to the AIC Board through the **director for committees, networks, and task forces,** copying the **executive director**, that outlines the following:

- Name of group
- Type of group (e.g. network, working group)
- Purpose of group (charge)
- Subject matter groups intend to cover
- How subject matter differs from topics covered by existing groups
- Why subject cannot be accommodated by existing groups
- Whether the group plans to collect dues in the future to support its activities
- Working groups and discussion groups only: Brief letter of support from the parent group leadership

The letter should include a list of current members pledging to join and facilitate establishment of the group. Requests for working groups must include at least 25 current AIC members; requests for networks must include at least 100 current AIC members.

The letter should identify officers who will serve for the first two years and outline a basic succession plan. If groups plan to collect dues, the initial officers should plan for the election of new officers.

The board acts on all requests within six months. Among the criteria they will consider:
- Track record of interest and demonstration of on-going commitment

- Relationship with existing groups
- Alignment with the organization's mission and strategic plan
- Staff and board capacity

Launch

New groups will work with their assigned staff liaison to create content for a webpage, share details about officers and term lengths, and invite all members with interest to participate.

Group officers will work in an officer community to host minutes and documents, discussions, and other items useful for the ongoing leadership of the group. Staff will also set up an online community to support communication between members interested in their topics.

Governance Documents

We follow a set of bylaws and code of ethics to further our mission, and are committed to transparency in our operations. We also abide by a board-approved strategic plan that outlines a planned trajectory for our organizations. Additionally, we act according to a set of core values, such as community, professionalism, and equity and inclusion.

For more information on organizational governance, including direct links to our bylaws, code of ethics, core values, and strategic plan, go to culturalheritage.org/governance.

Roles and Responsibilities

Specialty Groups and Networks

Officers and other volunteers are accountable to their group's members. Certain actions and decisions require approval from group membership, group leadership, and the AIC Board of Directors. Member approval is expressed through votes, which primarily take place prior or at the group business meeting at the annual meeting. Group membership should vote on the following topics: election of officers, changes in dues, revisions to the Rules of Order, funding for special projects, and major new initiatives. Officers can approve the group annual budget and regular business of the group without further approval. The Board of Directors must approve any changes to the Rules of Order of a group prior to the change being presented to group membership for approval. Groups are encouraged to self-determine thresholds for either cost or scope of projects to provide consistency in seeking member approval and can consult both staff and board liaisons when unsure.

These following are required responsibilities of these roles. Not every group has volunteers with these titles, but these are vital duties that must be completed by someone in your group.

- Chair
  - Prepare two board reports per year (aligned with annual meeting and IAG).
  - Write two updates per year and manage the [lead article](#) for the [Member Newsletter](#).
  - Share information and updates with group members via community and blog posts/eblasts.
  - Attends the Internal Advisory Group meeting or designates a proxy who must be a current or recent group leader.
  - Ensures an officer attends the annual meeting if there is planned programming.
  - Moderates and/or plans the group's annual business meeting.
  - Manages continuity planning and leadership transitions, including ensuring the leadership roster of the group is accurate in terms of roles and term dates.
  - Ensures communications take place within the Online Community provided for the officers.
- Program (or Vice) Chair
  - Leads annual meeting programming for the group. Tasks include:
    - Review abstracts
    - Plan sessions and schedules
    - Work with staff on group's reception, if any
    - Communicate with authors and co-authors
    - Ensure published abstracts and titles are complete and correct
    - Serves on the Annual Meeting Program Committee alongside other program chairs
  - Report back to officers with details
  - Must attend the annual meeting if they have planned programming or designate alternate (financial support for attendance may be available through group or AIC)
- Secretary/Treasurer
  - Takes notes of officer meetings and saves them in the officer community library.
  - Takes official minutes of the group's business meetings and shares with members for a vote by the next year's annual meeting.
  - Updates budgets and maintains files related to funds
  - Reviews quarterly statements posted in officer community by the staff liaison
  - Prepares budgets for the coming year (Jan-Dec) in August/September.
- Nominating Committee (optional)
  - Solicits interest in serving as the group's elected leadership.
  - Utilizes the strategic plan in outreach to members.
  - Helps declare open positions, identify members to fill unelected roles, and writes or updates position descriptions.
  - Identifies election candidates by February/March.
  - Submits names, statements and biographies for elected roles to the staff liaison by March 15, or earlier depending on the member business meeting date.

Groups can add other positions as needed to meet group goals according to volunteer interests. See also ⊞ Officer Structure for SG&N .

Committees, Working Groups, and Task Forces

- Chairs
    - Prepare board reports twice a year (aligned with the annual meeting and IAG) and submit to board liaison.
    - Hold regular meetings with committee members and staff and board liaisons.
    - Ensure meeting notes are taken and posted to the committee library.
    - Communicate accomplishments, events, or ideas (1-3 paragraphs) to members in the member newsletter and online community, which are very useful in building your board report.
    - Write two updates per year for the Member Newsletter. Committee chairs only.
    -
- Members
    - Attend meetings or read minutes if unable to attend.
    - Take on a manageable workload and update the chair on progress.

Staff and Board Liaisons

- Board liaisons bring ideas and concerns to the Board of Directors and share board perspectives on matters.
- Staff liaisons provide onboarding for new volunteers, provide administrative support which may include Zoom meetings, and manage rosters and community libraries. Throughout the year, they may also register officers for the annual meeting, update web pages, consult during the budgeting process, and contribute their institutional knowledge. They are not responsible for note taking or travel arrangements. They can make connections between groups.

Elections and Appointments

Timeline

- **November:** Share upcoming open elected positions via staff, email, and online communities
- **January:** Post the names of election candidates in the January through March member emails and online communities.
- **March:** Review applications, send ballot information (candidates and bios) to staff liaisons
- **April:** Elections; non-elected roles can be filled and people onboarded (refer to process below)
- **June:** Distribute final roster to newsletter staff and your online community

Elected Positions

Elected positions are officer positions of specialty groups and networks that require dues. These positions are elected by members of the group.

- Officer Positions: Chair, Program Chair, Assistant Program Chair (if desired), and Secretary/Treasurer. Templates for position announcements are in the IAG and Volunteer communities.
- Ballots
  - We run one ballot for all elected positions per year. If we do not receive candidates by the deadline, we will run a special election later in the year.
  - We may not place uncontested candidates on the ballot for certain positions. Officers though should still circulate the names of the candidates in their online communities and a deadline by which members can self-nominate. If we receive no other candidates, we will consider the candidate elected without opposition.
  - The board liaison will send the names of elected officers to the Board of Directors.

Appointed Positions

Appointed positions are committee, network, task force, and discussion group positions that are appointed by the board.

- Templates for positions are in the IAG and Volunteer communities.
- The chair should provide descriptions for all open positions to staff liaisons for posting on our website in January. The application process opens February 1 and is open for one month. Applications come through staff liaisons via the application portal.
  - If the application deadline closes with no applicants to a position, the group may need to recruit candidates. In this case, the recruited applicants must still complete an online application for administrative documentation purposes.
- Groups review the applications in March and select applicants before April 1. The Chair notifies the Staff Liaison and Board Liaison of the selected applicants before April 1 and the Board approves the selection by April 15. Applicants are notified before May 1.
- Committee and non-dues paying Network positions are appointed. Dues-paying groups may also have certain positions that are appointed and not elected.
  - Dues-paying groups: Appointed positions do not require voting by the group membership. Officers of the group/network review applications and make the decision.
  - Committees and non-dues paying Networks: The existing officers serve as application reviewers and the decision on whether to recommend an applicant as a new officer lies with the Chair or incoming Chair of the group. Once that decision is made, the Chair should confirm with the applicant that they are still willing to serve and notify them that their application has been accepted, pending board approval. The Chair should share the CV and name(s) of the accepted applicants with their Board Liaison to bring to the Board for a vote to approve and

with the Staff Liaison to update the Committee/Network roster with the appropriate term limits.
- The board prefers this method for reporting new appointed volunteers, which follows these steps:
    1. Send the board liaison your recommendations
    2. The board reviews and votes to approve or not (about a week process)
    3. Board liaisons will confirm with chairs and staff liaison of the approvals
    4. The chair notifies and confirms with applicants of their roles
    - Please submit any recommendations you have that require board approval in a single pdf including the information listed below. Include a summary or cover letter that with:
        1. the date
        2. open positions to be filled and length of term
        3. names of the people recommended for each open position; also helpful is one sentence about why they are being recommended
        4. you may include any other changes in roles/positions, but this is not required
        5. you may include information about other members/volunteers who are not in appointed positions, but this is not required.
        6. application materials for every person who needs board approval; most commonly this includes a statement of interest and CV

Notifications

The group Chair or Nominating Committee (for elected positions) should notify all applicants of their status. This is a way to acknowledge receipt of their application and to thank them for their time and interest even if they were not selected for a position. You might invite them to apply next year, or even assist in some other capacity, such as a specific project.

- Staff liaisons notify the group Chairs of election results. Chairs then notify and welcome new members. Once the new members have accepted, the Chairs should announce to the full group and notify the Staff and Board Liaisons.
- The Executive Director shares results of the AIC Board election with the Board and Nominating Committee nominees.

Reports and Minutes

Reports

The chairs of specialty groups, networks, task forces, and committees submit several types of reports to the board each year. These include two to three reports for regular board meetings and one Internal Advisory Group report.

Templates

Use these by clicking File / Make a Copy and saving one for your group.

Board Report - Committee Template
Board Report - Specialty Groups Template

Board Meetings

The Board of Directors meets three times per year to review current activities, develop policy, and plan for the future of the organization. Integral to the May and November board meetings are the reports by the chairs of specialty groups, committees, and task forces. These reports outline the group's recent activities related to the charge or goals and outline plans for future activities. They may include questions or recommendations for the board.

Reports should include highlights, a roster with terms, a summary of activities, and any requested board actions. Reports should be no more than two pages in length and are sent by email to the board liaison. The board liaison compiles reports from all their groups into one document and forwards them to the executive director for inclusion in the board notebook.

Internal Advisory Group

The Internal Advisory Group is composed of the chairs of all specialty groups, networks, task forces, and committees. The group meets with the board and staff once a year in the fall. This report is an opportunity for the various groups to be updated on all activities and to coordinate overlapping or complementary charges. It includes the group's activities since the last meeting and any issues or questions to be discussed at the meeting. It does not include issues intended for board review.

Reports should be no longer than two pages and sent by email to the board liaison. They can duplicate some of the board report information. The board liaison compiles all reports into one document and forwards them to the executive director for inclusion in the meeting packet.

Annual Report

Staff may request information from groups to be included in the organizational annual reports.

Minutes and Notes

All groups, networks, committees, and task forces should take minutes or notes during their regular meetings. These are essential to any organization or group and will be of great value to future officers.
- Minutes should be taken when any formal actions or votes are made and during every official group business meeting. All dues-incurring groups and networks must hold a yearly business meeting. These are legal documents.
- A video recording of the meeting does not constitute minutes, as votes and attendance need to be saved in written format.
- Officers should upload minutes/notes to the group's officer community in advance of the following meeting.
- Notes can be taken for all other meetings.

Use **Agenda and Notes Template** for agenda/notes in Google Docs.

Records Management

Follow the following records management guidelines for each type of document your group may create. Use the Officers Community to engage in discussions by setting your notifications to Real Time.

Keep in the Officers' Community Library:
- Meeting Agendas and Minutes (download from shared doc if used), including notations of officer votes
- Officer Handbook and/or instructional materials for future officer use
- Finalized documents and publications
- Copies of board reports
- Financial documents, reports, and summaries
- Rosters of officers
- NOTE: Use date system and descriptive title: such as "2024-05-01 Officer Roster for 2024-25"

Keep in member community library, if applicable:
- Guides and resources for your members
- Publications, such as postprints or resource sheets

For additional information, watch this short video: [Online Community Management Training](#) (includes best practices for documents).

Finance

Reimbursements

Reimbursement forms are available from your staff liaison. All requests or invoices for specialty groups and networks that collect dues must first be approved by the specialty group/network treasurer or committee chair before we can issue payment.

Send a completed Request for Reimbursement form with receipts within 30 days to the Finance Director at lbudhinata@culturalheritage.org and copy the staff liaison.

- Advance payments require prior approval from the Specialty Group/Network treasurer or committee chair by email notification or signature on the Advance Payment form.
- Please fill out the Request for Advance Payment form and send to the Finance Director at least two weeks before payment is needed. Attach a statement of purpose.

Invoices

AIC will only pay invoices for expenses that have been approved in the annual budget or have received written approval from director-level staff. All invoices for paid projects require prior approval by the specialty group/network treasurer or committee chair and anticipated costs should be shared with your staff liaison.

All project costs should be billed directly to AIC. Please alert the finance director when project costs will be billed. We must be made aware in advance of vendors, product requests, contractors, and approximate costs to ensure prompt payment and accurate accountability. If possible, estimates from vendors, specialty group/network treasurers, or committee chairs are appreciated. For example, send an email advising the Finance Director that Aptara will be invoicing $x amount to AIC for Textile SG postprints in July.

Groups and committees are not legal entities and cannot enter into contracts. The executive director, or a staff liaison, reviews and signs all contracts for services.

Quarterly Reports

- We prepare quarterly reports of all expenses and revenue for each specialty group, committee, and task force. The reports include budgeted items and actual expenses and revenues on a quarterly and year-to-date basis, along with the current reserve balance for specialty groups.
- The reports are emailed directly to each chair and treasurer and posted to the officer communities. If there are no transactions in that quarter, no report will be provided.
- These reports show income and expenses assigned to general accounts. Many specialized expenses may be grouped in a miscellaneous line item. Be sure to keep your own itemized records.

Budgets

- Guidelines for completing the budget worksheet are provided by your staff liaison.
- Budgets are created annually for each specialty group, committee, and task force. In July and August, staff liaisons will assist each treasurer and committee chair with designing projected budgets. An email will include past statements, prior year budgets, and guidelines for projecting costs, as well as a budget worksheet template.
- Budgets should reflect expected expenditures for the next year. Reserves are used to supplement in case expenses exceed income, and to support special projects of benefit to members, but should typically not exceed a year's worth of income. Excess reserves mean your members' dues are not being used for their benefit.

Revenue

- Use the figures from the previous year as well as current dues to project your income.
- Our books are kept on the accrual basis, which means we record revenue when it is earned, not when it is received. This means member dues received in the fall (paying in

advance for the next year's membership) will appear in financial statements as revenue for the following calendar year.

Expenses

Annual Meeting

- **NOTE: Our budgeting process may change in Summer 2025 so this section may become less complicated.**
- We use the figures from the previous year to estimate costs; staff should provide A/V and food and beverage estimates for you along with the year's budget template.
- Note that audio-visual costs for presentations will drive costs up quickly. If you anticipate needing extra technology for presentations and/or technical support for your session, you should budget more. Note that larger cities often charge higher fees for labor and equipment, so costs will fluctuate based on location. We will try to provide the best estimate.
- Food and beverage costs for breaks and receptions can also fluctuate based on city, location requirements, and caterer availability. Reception rental and catering costs are determined closer to the annual meeting, so estimates for those events are fine.

Internal Advisory Group (IAG) Meeting

- The IAG meeting of all chairs is held virtually via Zoom each year in November or early December.

Call Expenses

- Email messages and listservs (community discussions) are the most cost-effective means of communication. Conference calls via Zoom may also need to be included in a budget if members do not have their own accounts.
- Zoom conference calls can be scheduled through your staff liaison. Some groups may choose to pay for a discounted Zoom account through our main AIC account.

Donations

Stout

Each group with dues income typically contributes to the George Stout Fund, which provides financial support for students to attend the Annual Meeting or related conferences.
A budget line appears for Stout on budget worksheets and financial reports.

Professional Development

Each group with dues income is encouraged to give to the Professional Development fund.
A budget line appears on budget worksheets and financial reports for this contribution.

Other Line Items

- We use a standard chart of accounts for tracking activities. If your specialty group or committee is projecting expenses that do not seem to fit in one of the accounts, please contact your staff liaison. Additional line items can be added if necessary.

- If you are undertaking a special project with multiple expenses, you may want to maintain a separate project budget that ties into your overall budget. So, for instance, if your special project involves travel, you will want to track those expenses in your special project budget, in addition to your Member Travel line item (which will also include travel to IAG).

If your staff liaison is unable to answer, please direct financial inquiries to the attention of:

Linda Budhinata, Finance Director, 202-661-8067, lbudhinata@culturalheritage.org
Tiffani Emig, Deputy Director, 202-750-3346, temig@culturalheritage.org

Communications

Summary

The [Communications Guide](#) shares a best practices checklist and communications definitions for written communications from the AIC Board, committees, specialty groups, and networks. AIC leadership writes and distributes many kinds of written communications: board position statements on contemporary issues that intersect with AIC's mission, carefully researched position papers, volunteer leadership dispatches, *AIC News* articles, blog posts, and more. Only the AIC Board issues public-facing statements or stances on behalf of the AIC organization. Some communications, like position statements and papers, should have board approval since they determine broader strategic alignment. Other communications, like updates and event announcements, have more targeted focus and relate to the business of each group. We will use the checklist and definitions as essential tools for ensuring our organization sends out clear, specific messages that reach their intended audiences and uses the most effective communication channels.

Goal

To clarify communications best practices and guidance for AIC volunteer leaders, specifically written communications that represent the official business and purview of board, committees, specialty groups, and networks.

Topics not covered in this guide include verbal communications; communications that represent personal opinions of individual members; communications that represent FAIC Board,

programs, or operations; business meetings; and publishing platforms like post-prints, journals, wiki, or similar to disseminate scholarly or technical research.

Communications Checklist

Please review and check off these steps for successful communications.

❑ **Purpose:** Define the key goals of your message with succinct clear phrasing to make it timely, informed, and within scope.
   a. Is the topic within the basic scope of your mandate per Charge, Rules of Order, or Bylaws?
   b. Would the messaging be improved by gathering other viewpoints?
   c. Is the message of a sensitive nature?
   d. Are there groups whose opinion should be solicited and whose pre-approval would be respectful?
   e. Have you done due diligence to review your group's past communications on the topic as well as AIC policies, guidelines, or previous statements related to the topic?

❑ **Alignment:** Communications should align with the AIC mission, AIC Code of Ethics, and AIC Member Community Rules, Etiquette and Privacy Guidelines.

   a. Be sure that communications do not cause harm to members by using language that is in opposition to our values of diversity, equity, inclusion, access, and belonging.
   b. Communications should not impugn the reputation of the organization.

❑ **Partners**: Messages represent your group and have included all relevant leadership partners in creating and reviewing the topic.

   a. Do all leaders within this group understand and agree upon the message being communicated?
   b. Have you consulted your board and staff liaison to get feedback on the viability and strategy of your message? They are there to provide you with support, advice, and advocacy.

❑ **Audience:** Define your intended audience.

❑ **Channels:** Consider using a variety of platforms to amplify your message. Determine best channel(s) of communication based on your goal(s) and intended audience(s).

Definitions

WHO: AIC Leadership

AIC leadership are engaged and passionate AIC members who hold elected, appointed, or volunteer positions. The following groups should utilize these AIC Communications Guides.

More information about bylaws and the structure of each group can be found on our Governance page (About Us > Governance).

- **AIC Board:** The AIC Board are elected members who oversee and guide the organization. Members of the board liaise with all areas of the organization and can assist committees, groups, networks, and other AIC entities together with the AIC staff when discussing and fine-tuning ideas for broad communications and dispatches.
- **Volunteer leadership** is organized into the following structure. For more information see the AIC organizational chart.
  - **Committees:** Committees are groups of volunteers appointed by the AIC Board to provide focused, expert guidance on a specific topic. Committees leverage the knowledge of a larger group of people to help the board make the best decisions possible for the AIC membership. Committees may have volunteer sub-committees or working groups. Committees serve at the discretion of the board and are encouraged to reach out to their board and staff liaisons for guidance and support.
  - **Specialty Groups:** These are groups of AIC members organized around specific types of cultural heritage or practitioners. Specialty Groups have membership dues and elected officers. Many Specialty Groups have appointed or volunteer subcommittees to focus guidance on specific topics. Specialty Groups are encouraged to reach out to their board and staff liaisons for guidance and support.
  - **Networks:** These are groups of AIC members organized around thematic interests within cultural heritage. Networks may have membership dues and, if so, elected officers. Some networks have appointed or volunteer officers, sub-committees, working groups, affinity groups, or caucuses that also have focused guidance on specific topics. Networks are encouraged to reach out to their board and staff liaisons for guidance and support.

WHO: Audiences

- Internal audiences are intra-group (other members within the group, committee, or network) or intra-organization (other AIC members). Communications aimed at an internal audience could form the basis for external communications by the board.
- Communications aimed at external audiences should come from or be approved by the AIC Board. Suggestions for topics from volunteer leadership or individuals are welcome; reach out to board and staff liaisons for guidance and support.

WHAT: Types of Communications

The following hierarchy of potential communication formats are the primary pathways for posting, publishing, or disseminating information from your group to the wider membership and beyond. Consider how topics can evolve and gain depth by utilizing different pathways and reaching wider audiences. Not included are email or interpersonal communications for official business in, among, or between groups, the AIC Board, or staff liaisons.

- AIC Board Position Statement
  - AIC Board statements are carefully crafted public notices and position announcements that are meant to represent the organization. These may be shared on AIC Community forum(s) and emails for an internal AIC audience, and/or social media posts and press releases for a public audience. Board statements are not undertaken lightly since they are a permanent record of the thoughts and ideals of the AIC organization and must uphold the highest standards of the Code of Ethics.
  - Committees, Specialty Groups, Networks, or other AIC entities that wish to suggest a statement topic for the AIC Board should work with and contact their respective board liaison.
  - Individual members that wish to suggest a statement topic for the AIC Board should contact a board or staff member.
  - All draft statements will be reviewed by the board and staff liaisons.
- AIC Position Paper
  - Written by informed members, possibly via a task force appointed by the board, based on request for a position paper by members or board. Consult the "Position Paper Guidelines" on the Volunteer resources page.
- Dispatch
  - A dispatch from volunteer leadership on the AIC Community platform shares an internal opinion statement on a topic related to their mission.
  - Dispatches should further the goals and objectives of the Committee, Specialty Group, Network, or other AIC entity.
- Lead article
  - Cover articles go into depth on a specific subject and follow the editorial schedule for the *AIC News*.
  - *Tip: Use the platform of a lead article to share your group's perspective and expertise with a wider AIC audience.*
- Article
  - Topic-based article in *AIC News* on specific subjects of interest to members.
- Updates
  - Regular updates or bulletins regarding volunteer leadership business in the AIC News sections for "Association News" under "Committees Updates" or the "Specialty Group & Network Columns".
  - *Tip: Cross-post to the AIC Member Community to raise awareness among both internal groups and broader membership about programming, collaborations, and activities from your group.*
- Email ("e-blast")
  - An email written by an AIC entity with that specific group's constituency as the intended audience but distributed directly in real time to members by AIC staff, often called an "e-blast" or "blast".
- Blog post

- ○ Write a blog post within your group's specific Community to highlight voices and ideas.
  - ○ Authors can also choose to make blog posts accessible to audiences outside that community forum (i.e. to all AIC members, anyone with a culturaheritage.org login, or the open web).
  - ○ *Tip: Use the advanced features to add keyword tags for search engine optimization, select audiences, and more.*
- Social media posts
  - ○ Coordinated by the AIC Staff, primarily the Outreach Manager, individuals and groups or networks can suggest ideas and topics for social media posts on AIC's Twitter, Facebook, LinkedIn, YouTube, and Instagram accounts.
  - ○ *Tip: Members are encouraged to cross-post, retweet, and support AIC's official social media channels.*
- Announcements
  - ○ Information about an event or topic that is time-dependent and limited in scope.
  - ○ *Tip: For internal audiences, use the AIC Community platform(s). For broader and international reach, use the Global Conservation Forum for topics relevant to conservation and preservation professionals.*

WHERE: Channels for Communications

- *AIC News* is a newsletter published online four times a year to provide members with up-to-date news on national and international conservation issues, new materials and research, conferences, publications, and employment opportunities.
- *Community Forums* reach all AIC members as well as specialty groups, networks, and committees as determined by membership and volunteer leadership roles. Each community has a discussion board, blog, library, and events page. Community settings can be customized to include receipt of communications in real time, daily digest, or weekly digest.
  - ○ Note that the *Global Conservation Forum* is a moderated community forum for discussion on topics relevant to conservation and preservation professionals with an international audience. Forum participants are not all AIC members.
- *AIC e-mails* ("e-blast") are distributed directly to members by AIC staff and provide focused attention on a specific topic in real time.
- The *AIC website* hosts individual pages for Committees and Groups/Networks.
- Social media: AIC's Bluesky, Facebook, LinkedIn, YouTube, and Instagram accounts

Example

When using a column or post to ask AIC to do something, it is most effective to bring this idea to your board and staff liaisons for initial discussion. They can tell you if other groups are working on an aligned project that would benefit from collaboration and provide feedback on viability and/or strategy.

Here is an example:

A message posted by a group on the AIC Member community includes a sentence like "We call on AIC to paint the town red." This post reaches all members and could suggest that the group has approached AIC leadership about this and that the leadership is ignoring the issue, does not want to paint the town red, or that they feel red is bad. None of these may be the case.

It is important to remember that many board statements and position papers arise from the ideas and efforts of members and that a united voice is stronger. If the group is interested in painting the town red, they should ask a staff/board liaison about painting the town and get feedback. The staff/board liaison might let them know that another committee is also interested in red and has been exploring painting the town and would welcome additional participants. The liaison might also share that the Board itself is working on this and would welcome thoughts and ideas from the group.

This gives the group the capacity to help form a plan, and they can post about their efforts to their community and share the information: "We asked AIC to paint the town red, and they are interested, and/or are excited to share support for a new mural featuring many reds."

This synergy of effort has the capacity for more impactful changes to the organization and prevents duplication of time and energy by volunteer leaders.

Social Media

- While there are some legacy social media accounts for AIC groups on social media platforms, we strongly recommend against maintaining a separate social media presence for your group.
- You can work with Outreach Manager [Katelin Lee] to share information about your group's work on our social media platforms. Learn about the platforms we participate on. Kate welcomes all submissions and encourages volunteers to plan social media content throughout the year. She is available to discuss strategies and calendars for your group.

Website

Review your pages
- Check for outdated information
- Think of what you'd like to share with the public or potential members
- Send updates to your staff liaison

Newsletter

AIC News is published quarterly. It is a way to connect with AIC members, and to share professional content that focuses on things you need in your career. Make use of this space to share important news, activities, virtual events, and program details. It also serves as a record keeping for future referencing.

The newsletter is published in January, April, July, and October.

Columns

- Quarterly columns are due one month before their publication, and should be sent in Word format to Carmina Lamare-Bertrand on the 15th of the following months: December (for January), March (for April), June (for July), September (for October).
- Word count should be:
    - Lead article: 600 – 2,000 words, 1-5 figures, and 1-2 tables
    - Health & Safety and/or other topical article column: 1,000 words limit, 1-5 figures, and 1-2 table
    - In Memoriam: 800 words limit, and 1-2 photos
    - Specialty Groups and Networks Columns: 200 – 800 words, 1-2 photos per group/network
    - Committee Reports: 200 – 800 words, 1-2 photos per group/network
- Content:
    - Include a byline: name of contributor, their group title (volunteer position), and email
    - Hyperlinks: Make use of them when necessary, but do not overuse
- Use of images:
    - Clearly mark where in the column the images need to be placed. They can be included in the column for reference, but all images must be sent separately as a jpeg or jpg.
    - Image minimum size requirement: High resolution, minimum 200dpi
    - Copyrights: Always cite and attribute your sources, and make sure you have permission if the image is not yours.
    - If using more than one image, please label each file accordingly

Lead Article

Article content is decided several months in advance in collaboration with the newsletter editor Lisa Goldberg. The article word count limit is 2,000 words, but supplemental information can be included as boxes, charts, graphs, or in other formats, such as articles in other *AIC News* columns.

Lead article format and editorial style:

- Content & use of images: see description under Columns just above
- Avoid the use of footnotes and endnotes (the template doesn't have space for these). If you must, these could be added as notes at the end of the article - 3 max. Reach out to Carmina for more information.
- Require the use of JAIC's style for the References: https://files.taylorandfrancis.com/tf_ChicagoAD.pdf

The lead article schedule is available online.

Contacts

If you have any questions about writing a column, deadlines, or the lead article, please reach out to:

- Lisa Goldberg, Editor, lgoldberg@lgpreservation.com
- Carmina Lamare, Production Assistant, carmina@culturalheritage.org
- Bonnie Naugle, Production Editor, bnaugle@culturalheritage.org

Group-specific Newsletter

We encourage all groups to stay connected with their members and constituents. One way to share information and activities of your group, network, or committee is to use the blog feature to share a newsletter in the AIC Online Community. If you plan one of these communications, alert staff so we can include a link and excerpt in our monthly email newsletter and/or via email to your group.

To prepare a newsletter or blog post, include these items:

- **Subject line:** Try to include the name of your newsletter and the issue, such as "Sustainability News, January 2024."
- **Text:** A newsletter should be at least two paragraphs but can be as long as you like. Make sure to use subheads and bullet points to break up the text. It should include information related to your group and of interest to your readers.
- **Images:** Prepare your images in advance so you can upload them to the blog easily.
- **Image/photo credits:** You should have captions and/or credits for each image and permission to use them. Search for copyright-free images using the Google Image Search - click on Tools then Usage Rights and select Creative Commons licenses (see image below). You can also visit Creative Commons to search other free image sites, visit one directly (such as Pixabay or Flickr) to find images, or use your own images. You can put the images credits at the end of your article if you prefer.
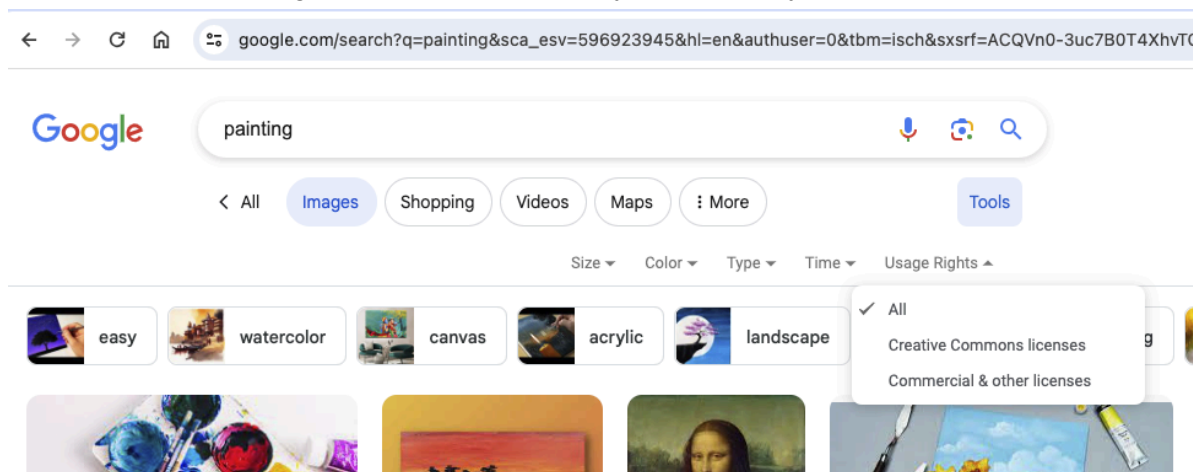
How this differs from the AIC News

The content submitted to *AIC News* should be related to the organization. It should include updates about leadership (including volunteer openings), annual meeting planning, future events, summaries of past events, etc. We typically limit the word count for these columns and rarely include images. For more information about *AIC News*, please contact carmina@culturalheritage.org.

Group-specific newsletters are a way to connect more informally with your audience and offer more regular updates.

Preparing the Newsletters
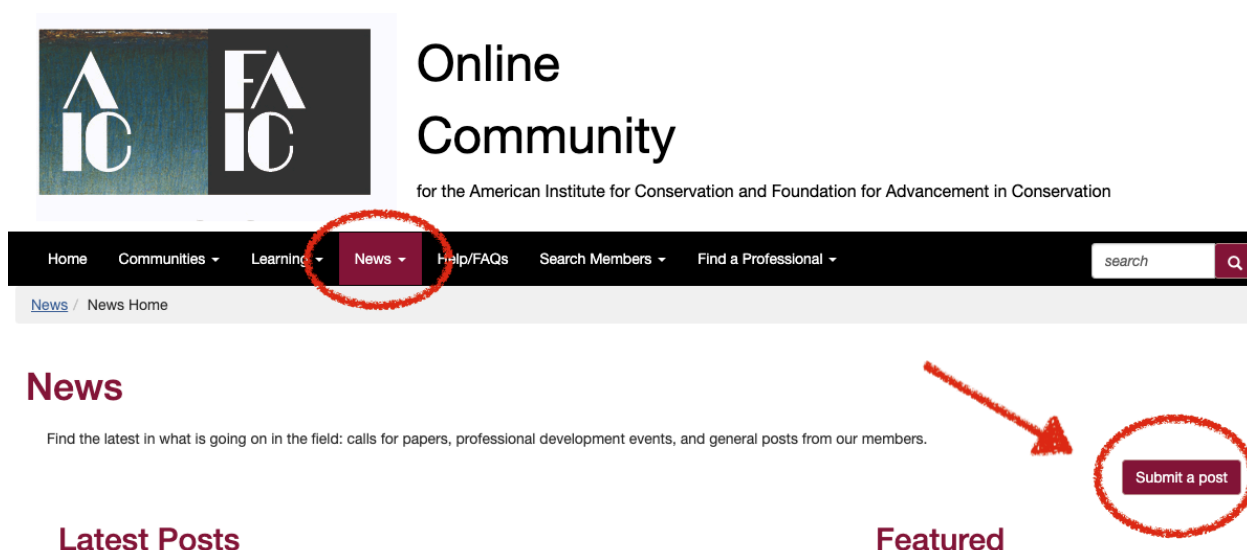
As an AIC member, you have access to the Blog feature on the AIC Online Community. (Please alert a staff member if you have difficulty and we can enable your access!)

You have three options: connect a blog post to your account only; connect it to the AIC Member Community, or connect it to a specific online community such as the Wooden Artifact Group community. You can also set the audience and levels of access.

Connect a blog post to your account only

Logging to the online community, click on **News** on the menu bar, then select **News Home**, followed by **Submit a post**. Once you have entered the text, you click on **Publish.** Posts can always be saved as a draft and be published later.

- Do not select a community if you want it to be in the News section only.

Connect it to the AIC Member Community

When you login to the online community, click on the **Communities** tab and select the **AIC Member Community**, then select the **Blogs** tab. Click on **Create a New Blog Post** which is found to the right of the listed blog posts. Posts can always be saved as a draft and be published later.

- Remember to Set the Access to your Post (see instructions below)

Connect it to a specific online community

VIsit that **online community** and click on the **Blog** tab. Click on **Create a New Blog Post,** then add your text and images. You can save it as a draft or publish directly. Posts can always be saved as a draft and be published later.

- Remember to Set the Access to your Post (see instructions below)

Set the Access to your Post

You can set the level of access for your post at the end of the page:
- Public (no login required)
- Authenticated (login required, but membership not required)
- CONSERVATIONUS [AIC] member (login required, AIC membership required)
- Selected Community (login required, only a member of the associated community can read)
- Allow comments or don't allow comments; only AIC members can comment.

Where to Find my Draft?

Once logged into the online community, click on your profile picture (upper corner right-hand side). Then click on the **Profile** button. This will take you to your profile page, where you'll click on **My Contributions** and then on **My List of Contributions**. Under **My Posts**, you'll see the full list of your contributions. To view your draft only, click on **View all items** and choose **View draft items**. Open your message by clicking the title or selecting **Edit Draft**; once you're ready to share, click on **Post.** This URL will take you directly to the My Posts page: https://community.culturalheritage.org/directory/individuals/profile/contributions/my-posts (must login to see it) Below you can see how to toggle your posts to **View Draft Items**.

Sending your Newsletter

Your staff liaison can help explore your options and they can help review your content.

We recommend sharing in a variety of ways to reach members that access news differently.

Note: Blog posts only appear in Consolidated Digests, so people who are subscribed to regular digests will not see them. Consolidated Digests include library entries, blog posts, and other non-discussion posts, so it's worth adding one to your subscriptions! This means we have to alert people to your post.

We recommend using several of these options:
- **Post the permalink** (found at the bottom of your post after publishing) to the online communities that include your audiences. Include a note about the newsletter and possibly an excerpt to entice people. Let them know whether they will need to log in to read.
- **Repost again** in a few days to catch others who missed the first announcement - you can reply to your own discussion post to keep them together. Include a fresh excerpt or image from the newsletter.
- **Submit the newsletter link** to staff for inclusion in the monthly AIC News email. Mail to Bonnie Naugle and include a few lines about the newsletter to highlight it.
- **Ask staff to send an email** to your audience that features the newsletter. This is great for the first edition or for periodic reminders; it's not something we can do for monthly or biweekly newsletters as there are too many groups.
- Include a list of newsletter links in your twice-annual **AIC News column** so members can go back to read ones they missed.

Email Bonnie Naugle at bnaugle@culturalheritage.org to submit to the monthly member email or schedule a specific email to your group.

Group Lists

Specialty group member lists are available by contacting Ryan Winfield, Membership Manager, at rwinfield@culturalheritage.org.

No fee is required for specialty groups requesting their lists. Some groups require mailing lists for publication mailings; please request these lists from Ryan one week in advance.

Email Blasts

Email blasts to group members should be scheduled with staff member Bonnie Naugle, Communications & Membership Director, at bnaugle@culturalheritage.org.

Logos

We require permission to be granted for every use of AIC and FAIC logos. Please contact us at info@culturalheritage.org to request permission.

Logo Permissions

The AIC and FAIC logos may only be used to refer to the organization, never an individual. The logos may be used on a webpage that describes what our organizations do and should link back to our homepage. The logo should never be used to indicate membership in AIC. Permission is required before using these logos.

AIC members in good standing who have attained peer-reviewed professional designation may use the provided "marks" in their email signatures, on their websites next to their names or biographies, or in printed materials. Additional permission is not required for this use. However, the AIC and FAIC logos should not be used in this way.

About the Logos

Four logos are used to reference the American Institute for Conservation, (AIC) the Foundation for Advancement in Conservation, (FAIC) the two organizations together, (AIC and FAIC) and the two organizations together with FAIC leading (FAIC and AIC).

- The AIC logo consists of the full name, American Institute for Conservation, the tagline "Preserving Cultural Heritage," and the corresponding icon.
- The FAIC logo consists of the full name, Foundation for Advancement in Conservation, the tagline "Protecting Cultural Heritage," and the corresponding icon.
- The joint AIC and FAIC logo consists of the AIC icon and the FAIC icon with the text culturalheritage.org.
- The joint FAIC and AIC logo consists of the FAIC icon and the AIC icon with the text culturalheritage.org.

In each instance, these elements are brought together in a specific manner to create the logo. Do not attempt to recreate the logos by using the icon in conjunction with a similar typeface. The spatial relationships between the words and images must be preserved.

Logo Size

The logo has been designed to maintain legibility across different sizes, however the preferred size for display for all logos is 2.25" wide. The minimum size for displaying all logos is 1.25" wide. When changing the size of the logo, the width to height ratio must remain in the same proportion. No elements of the logo may be deleted in resizing.

Colors

The AIC and FAIC logos must always be presented against a background that will give enough contrast for the mark to be legible. When possible, the black logo should be used on a white background.

When using the logo on a dark background, the white logo should not be placed directly on a densely patterned area. Clear space should be maintained.

AIC Logo	FAIC Logo
AIC and FAIC Logo	FAIC and AIC Logo

Clear Space

When the logos are used in combination with text or images, there must be a clear space around the logo.

The logo is required to have a set border based on the height of the upper-case "A" in the logo. No copy, graphics, or images may intrude on this minimum distance. See examples, below:
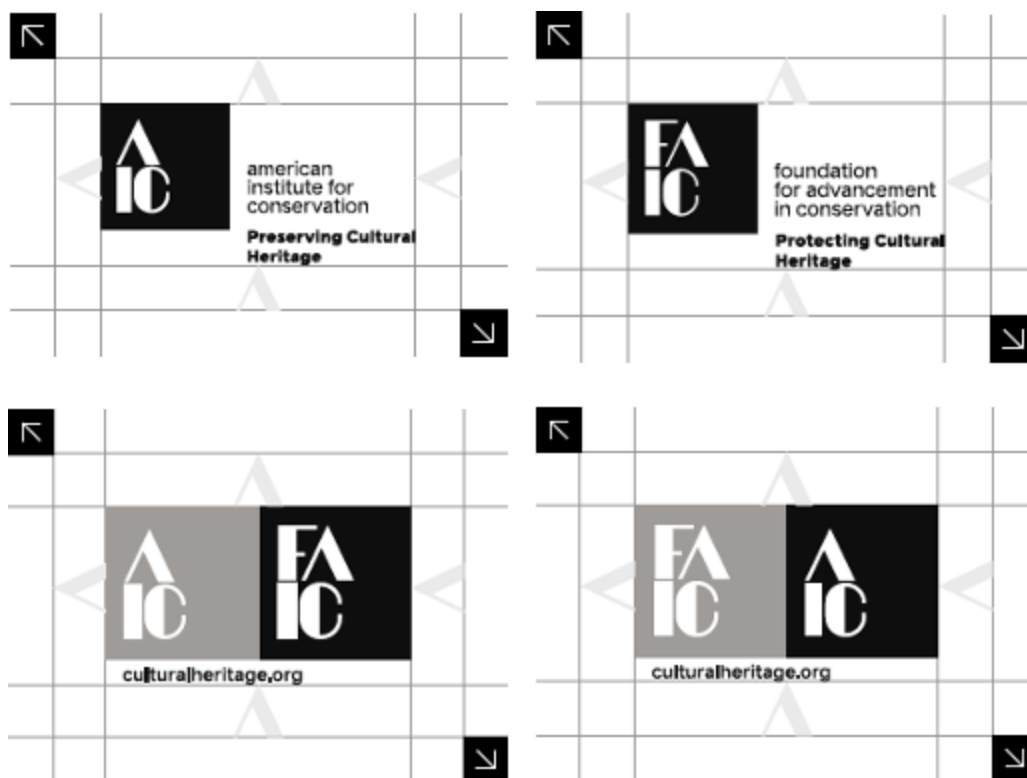
Prohibited Logo Variations

Don't compromise the overall look of the logo by rotating, skewing, or distorting it in any way, including by adding unnecessary or unattractive text decorations like drop shadows or outlines.

- Don't rotate the logo
- Don't skew the logo
- Don't place elements in the logo clear space
- Don't resize any part of the logo
- Don't alter or rearrange any part of the logo
- Don't remove any part of the logo
- Don't add any effects to the logo
- Don't alter the color of the logo
- Don't contain the logo when using imagery or colored backgrounds

Don't rotate the logo.

Don't skew the logo.

Don't place elements in the logo clear space.

Don't resize any part of the logo.

Don't alter or rearrange any part of the logo.

Don't remove any part of the logo.

Don't add any effects to the logo.

Don't alter the color of the logo.

Don't contain the logo when using imagery or colored backgrounds.
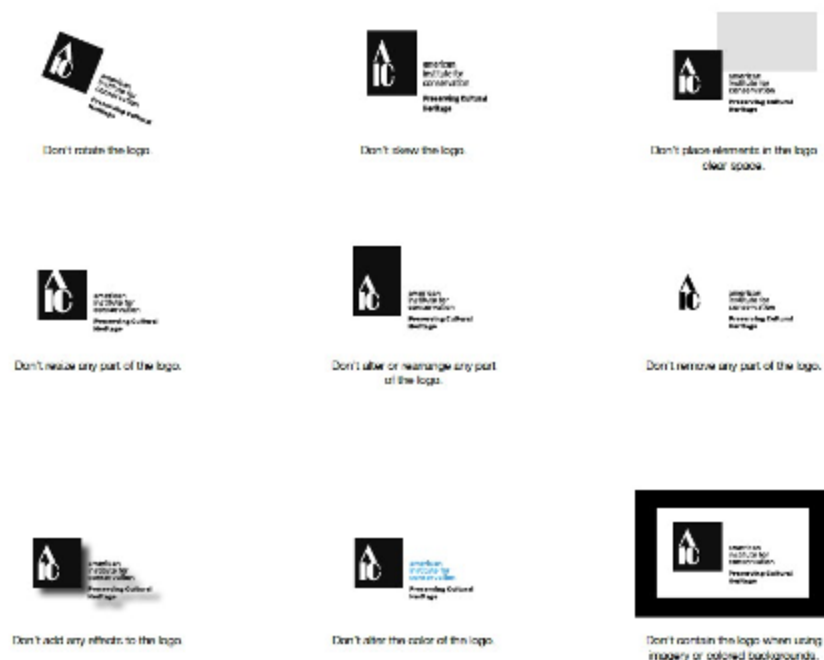
Education and Training

Annual Meeting

Abstract Review

- General concurrent session proposals are submitted the year prior to the meeting. Abstracts are submitted in the Fall prior to the meeting; for the 2026 meeting, the deadline is September 15th, 2025.
- Online schedule process/dates
- Planning special events (reception, etc.)

Types

Pre or Post-session seminar or Symposium

Pre-session seminars offer the opportunity to explore a topic over the course of a half day or full day. Groups may propose these as part of the annual meeting program proposal process.

- Instructors: varies
- Registration fees: varies

Onsite Workshop

Interactive learning that includes a hands-on component or has another reason that makes it not conducive to online learning. Workshops should be a half day to 2 days. FAIC can typically support a total of 8 Annual Meeting workshops per year.

- Instructors: One to three instructors
- Instructor stipends: $1,000/per day for workshop at conference center, $1,200/per day for workshops off-site to be split amongst instructors; no prep fee or travel/accommodation support unless income from registration allows for it; speaker rate to register for meeting

Networking/Discussion events

Can be in person or virtual. Online networking and discussion events should be no more than two hours, with the majority of the time being spent in discussion, whether in small groups or in the whole group. Any presentations should be less than half the event time.

- Annual meeting events should be proposed to the Communications & Membership Director by October
- Funds for F&B, room rental, etc. come from membership dues

Lunch Session

Lunch sessions are 90 minutes in length and are often panel discussions.
- Instructors receive comped lunch
- Registration fees: typically the cost of the lunch

Meeting

Groups may occasionally have need for informal meetings at the annual meeting. These require meeting room access arranged in advance. To ensure space is available and the event is included in the schedule/program provided to participants, requests for meeting space must be submitted to the Membership and Communications Director at least eight weeks in advance of the meeting.

Outside of Annual Meeting

AIC members have benefited from a growth in year-round programming over the past few years. These have been primarily online events on topics relevant to specific groups or the membership as a whole.

FAIC has a professional development endowment that supports workshops in the field. Workshop topics are determined by staff and AIC Education and Training Committee with the needs of the greater field in mind. The FAIC strategic plan, field-wide assessments such as Held in Trust, and survey results are used to guide these decisions. For the past several years, FAIC has provided a proposal process to allow AIC groups and members to propose workshop topics for consideration by FAIC.

The following processes and guidelines for program development by AIC committees, specialty groups, and networks are intended to assist both group leadership and staff with budgeting, staff support, promotion, communications, and consistency across the organization.

Timeline

April - June: Staff works with specialty groups, networks, and committees to familiarize and start the process. Staff will share a list of topics previously proposed or requested. Group leadership selects topics, identifies potential instructors, coordinators, and/or host locations. Drafts budget in consultation with staff liaison and discusses funding options, including if the group is willing/able to commit funding. If surveying membership, consider planning for 3 years. Survey template can be viewed here and survey use should be coordinated with staff liaison.

July 1: Proposals submitted through the application here for review. Proposals will continue to be accepted and reviewed on a rolling basis as resources are available.

July - August: AIC Education and Training Committee reviews and selects which workshops FAIC will support; AIC staff reviews other topics for staffing and budgeting options. Events that are not approved will be added to a list of topic ideas to be considered in the future.

September 1: Staff liaisons share selection of events with budgets with groups.

October 1: Get commitment from coordinator, instructor(s), and host (if applicable), and schedule the event.

November 1: Staff share a tentative schedule of events for the upcoming calendar year.

Early December: Budget approval by boards and schedule of events shared with membership.

Types

Unless otherwise noted, fees are the member rate. Non-member rates are typically 20% more.

Workshops

For the near future, FAIC can only support workshops onsite at the AIC Annual Meeting. FAIC can support 2-3 online workshops.

Onsite Workshop

Interactive learning that includes either a hands-on component or has another reason that makes it not conducive to online learning. Workshops should be 3-5 days.
- Instructors: At least one instructor and one coordinator with option for up to three instructors

- Registration fees: $165/day (plus option for lunch at $25/pp/day) for AIC members
- Instructor payment: $115 per hour or $920/day (with 2 days of prep for a 3-day workshop, 2.5 days prep for a 4-day workshop, 3 days prep for a 5-day workshop)
- Coordinator payment: $115 per hour (20 hours plus free registration)
- Accessibility Guidelines are online.

Online Workshop

Online events that include at least one live session (which can be recorded and viewed later) with option for multiple sessions (over days or weeks). Content includes: an interactive component such as a discussion, handouts and resources, and an option for pre-recorded case studies.

- Instructors: At least one instructor and one coordinator with option for multiple instructors
- Registration fees: $20 per hour of online instruction for AIC members
- Instructor payment: $115 per hour with 2 hours of prep for 1 hour of presentation
- Registrant access: One year from end of event
- Coordinator payment: $115 per hour with 1 hour prep for 1 hour of presentation
- Accessibility Guidelines are online.

Symposium

1-3 day online or in-person program on a single topic (e.g. Collaborative Workshops in Photo Conservation symposium). FAIC can support no more than 1 per year.

- Instructors: At least two coordinators and multiple presenters.
- Registration fees: $100/day for AIC members
- Instructor payment: $115 per hour with 2 hours of prep for 1 hour of presentation (Symposium presentations are usually 20-30 mins.)

Self-study course

Pre-recorded content from at least one instructor and handouts that participants can access any time. Self-study courses may include self-quiz components to assess learning as well as possibility to have limited-time access to communication with the instructor(s).

- Instructors: At least one instructor
- Registration fees: $20 per hour of instruction
- Instructor payment: $115 per hour with 2 hours of prep for 1 hour of presentation
- Coordinator payment: $1,000 flat fee
- Registrant access: One year from registration
- Accessibility Guidelines are online.

Webinar

1-2 hour live informational session that can be recorded for self-study at a later time. Participants won't have access to video and microphone but can use the chat and Q&A feature. Groups should consider grouping webinars in webinar series. AIC can support no more than 1 webinar per month per group.

- Instructors: At least one instructor with option for multiple presenters or panel
- Registration fees: Typically free for AIC or group members, $20/hour for non-members
- Instructor payment: $350 for 60 minutes (based on $115 per hour with 2 hours of prep for 1 hour of presentation) total, split amongst presenters if multiple presenters
- Coordinator payment: Group volunteer serves as coordinator, no fee
- Registrant access: One year from registration
- Accessibility Guidelines are online.

Town Hall Session

We occasionally host 60-minute sessions using Zoom meetings on a planned topic. These may provide updates or host topical discussions with room for feedback, or be held as an open forum to meet others and discuss a given topic. Gaining qualitative feedback is the intended outcome. We can offer up to 4 per year, with the Member Business Meeting serving as one of the four.

Networking/Discussion events

Can be in person or virtual. Online networking and discussion events should be no more than two hours with the majority of the time being spent in discussion, whether in small groups or in the whole group. Any presentations should take up less than half the meeting time. AIC can support no more than 1 webinar per month per group.

- In-person local events may be organized by members; staff should be alerted but do not manage.
- Funds for F&B, room rental, etc. come from membership dues.
- Lunch & Learn: Short online session, from 20-60 minutes maximum, with a predefined and narrow topic. Q&A period encouraged. May be Zoom webinar or meeting format, with meeting preferred. Recordings can be made with presenter permission, but recordings are only accessible for a limited time, such as one month.
    - Instructors: None
    - Registration fees: $0 members, $20/hour for non-members
    - Coordinator payment: Group volunteer serves as facilitator, no fee
    - Registrant access: One month from registration
- Networking: Guided or open

Responsive Events

Occasionally, situations may arise that warrant responsive events that cannot be planned so far in advance. For example, there might be a desire to convene an online discussion following a newsworthy cultural heritage event. Please notify your staff liaison to discuss these activities. We will support as many as resources allow.

Logistics

Participant Support

All onsite and online workshops will have free registration for at least one third of participants. This will be factored into the budget. Additional support can be provided with up to $1,000 travel stipends for the participants receiving free registration, if budget allows.
Host organization receives one complimentary registration.

The non-member rate for workshops is an additional 20% of the member rate. Member rates for workshops are for all AIC members (not exclusive to specialty groups).

Accessibility Guidelines

Please follow these accessibility considerations in your planning: https://www.conservation-wiki.com/wiki/Accessibility_Issues_in_Conservation.

Program Implementation Timelines

Annual Meeting
- October 1: Staff requests final workshop description and instructor bios
- November 1: Final workshop description and instructor bios due to staff
- December 1: Workshop registration opens
- February 21: Workshop registration and budgets are re-evaluated by staff
- March 1: LOAs sent to workshop instructors
- April 1: Supply list due to staff
- April 15: Handouts for printing due to staff
- May 1: Digital handouts and message to participants due to staff

Outside of the Annual Meeting

Onsite Workshops
- 18 weeks before event staff sends LOAs to instructor(s), coordinator, and host and requests final workshop description and instructor bios
- 4 months before event announce workshop and open application
- 3 months before event close application and begin review

- 9-10 weeks before event review ends and selection of participants is made
- 8-9 weeks before event notify applicants of participation and funding status
- 7 weeks before workshop deadline for participants pay registration fee; unpaid spaces are offered to waitlist
- 6 weeks before event instructor(s) sent supply list to staff
- 4 weeks before event instructor(s) send handouts for printing to staff
- 3 weeks before event coordinator and staff order catering
- 2 weeks before event instructor(s) send digital handouts and message to participants
- 1 week before event staff sends message to participants and provides access to workshop portal

Online Events

- 12 weeks before event staff sends LOAs to instructo(s), coordinator, and host and requests final workshop description and instructor bios
- 10 weeks before event announce event and open application (if applicable)
- 6-7 weeks before event close application and begin review (if applicable)
- 5-6 weeks before event review ends and selection of participants is made (if applicable)
- 4-5 weeks before event notify applicants of participation and funding status (if applicable)
- 3-4 weeks before workshop deadline for participants pay registration fee; unpaid spaces are offered to waitlist (if applicable)
- 2 weeks before event instructor(s) send digital handouts and message to participants
- 1 week before event staff sends message to participants and provides access to event portal

Roles

Organizer: An FAIC staff member will act as the administrative organizer and point of contact for the workshop.

- Create letters of agreement for the instructor(s), host, and coordinator.
- Create a workshop portal where individuals can register for the workshop.
- Create participant application form and manage application process including notifying applicants of their application status.
- Advertise the workshop through the AIC member communities, our social media, and the Global Conservation Forum. The organizer can advertise the workshop elsewhere if a list of contacts is provided.
- Order workshop materials (as budgeted for) if a list is provided with hyperlinks to each item.
- Order printed handouts (as budgeted for).
- Manage registration and create a participant list.
- Format and upload handouts and resources provided by the instructor(s) to the workshop portal.
- Send a message to participants with logistical information prior to the workshop.
- Manage a waitlist if the workshop is sold out.

Instructor(s): The instructor(s) will create and present the content of the workshop.
- Sign letter of agreement and provided complete W9/tax form and/or wire transfer form
    - Instructors are typically provided with $920 per day of instruction and preparation (2 days of prep is usually budgeted for).
    - Travel expenses up to the budgeted amount are included in the agreement and will be reimbursed with receipts and a reimbursement form provided to the organizer. Instructor must make their own travel arrangements.
- Provide a workshop description, short bio, and headshot to use to advertise the workshop.
- Provide organizer with any prerequisites for participation.
- Advertise workshop to their communities (outside of those that the organizer will advertise to).
- Participate in the anonymous review of applications and selection of workshop participants.
- Provide the host with any requirements for the workshop space including special equipment.
- Provide the organizer with a list of materials to be ordered six weeks prior to the workshop. The organizer will share this with the host to see if any supplies can be provided by the host.
- Provide the organizer with handouts to be printed four weeks prior to the workshop.
- Provide the organizer with digital handouts and message to participants two weeks prior to the workshop.

Host: A staff member at the institution that will be hosting the workshop (ideally a conservation staff member).

- Participate in the anonymous review of applications and selection of workshop participants.
- Advertise the workshop to their communities, especially communities local to the workshop location (outside of those that the organizer will advertise to).
- Provide a list of nearby accommodations and dining options to share with participants.
- Provide organizer(s) with a recommendation for catering or assist with internal caterer.
- Review list of materials and note if any can be supplied by the host institution.
- Work with instructor(s) and provide photos or information about the space and equipment.
- Provide organizer(s) with logistical information to pass on to participants such as where to meet, what to bring/what not to bring into the workshop space, any local happenings in the evenings, parking, etc.
- Receive supplies and printed handouts being delivered to the workshop site.

Coordinator: Could be a staff member or intern or fellow at the host institution, SG/Committee/Network member or leadership interested in assisting with the workshop, or an emerging professional local to the host institution and interested in assisting.

- Assist host with responsibilities listed above (some of this will depend on if the coordinator works at the host institution, but they should do as much as possible).
- Participate in the anonymous review of applications and selection of workshop participants.
- Assist with workshop set up and clean up.
- Assist with meeting workshop participants and getting them to the workshop location.
- Receive catering orders on workshop days.
- Assist instructor(s) as needed during the workshop.

Funding

Sponsorships

We are dedicated to supporting the goals and activities of our groups, including through soliciting and facilitating sponsorships. Sponsorships make group activities more financially sustainable and provide opportunities to enrich member experiences. The following are our guidelines for developing and maintaining these sponsor relationships.

Leads

Finding Leads

We highly encourage groups to be proactive about searching for opportunities for sponsors. There are a limited number of organizations who currently provide sponsorship funding for group activities and those related to conservation, which means it is crucial to expand this group. We encourage groups to think creatively; consider all connections to the field (materials, suppliers, researchers or research providers, allies, collaborators, etc.) and review specific topics your group is exploring that might be of interest to potential sponsors. An event focusing on photography, for instance, might reach out to a supplier of cameras or film, or to an established photography expert in the field. If groups have suggested leads for sponsorship opportunities, including contacts at these organizations, these leads should be provided to their staff liaison.

Annual Meeting Exhibitors

Exhibit Hall Diamond and Gold booth packages include sponsorship of an annual meeting event. Exhibitors are typically the first group approached for sponsorship.

Workshops

Workshop sponsorships help allay material costs for FAIC workshops. Any leads for workshop support should be passed along to foundation@culturalheritage.org.

Managing Leads

As we are frequently in conversation with potential funders, it is crucial to ensure that all funding asks are strategic, targeted, and coordinated. Before reaching out to a potential sponsor, first speak with staff. This allows us to bundle asks and bring multiple projects that may be of interest to a potential sponsor, ensuring the maximum sponsorship funding possible. Additionally, we may have an existing relationship or pending funding request with an organization and it is important to acknowledge those factors in considering when or how to approach a potential sponsor. Sponsorship requests need to be centralized within staff who have knowledge of group activities and sponsorship opportunities, as well as legal capacity to accept sponsorship funds.

Agreements

Groups are not independent legal entities and cannot accept funds. Accordingly, negotiating any kind of contract must be done by a designated staff person, as officers cannot enter into or sign a binding contract or agreement, including sponsorships. All sponsorship funds must be received by and made payable to AIC, who will apply the sponsorship funds accordingly. Officers will be able to track these funds through their quarterly reports, which are provided by the Finance Manager via the group's staff liaison.

Acknowledgments

Groups should keep in mind the importance of maintaining positive relationships with sponsors. This is an essential aspect of soliciting and capitalizing on sponsorships. Acknowledging sponsors before, during, and after an event is a key aspect of sustaining these relationships. We recommend that groups acknowledge sponsors in all promotional materials, at the event, and following the event, both at subsequent related events and via a written note of thanks. Also consider any tangible or intangible benefits the sponsor receives from sponsoring your event or project. If officers would like assistance in contacting sponsors to offer thanks or discuss opportunities for sponsors to engage with the group members, the staff liaison can assist with these communications.

Timeline

This is a general timeline to help provide context for sponsorship of annual meeting events. As sponsors may be operating on different fiscal schedules, flexibility may be necessary.

June – Right after the Annual Meeting, current year sponsors are thanked and asked if they would like to continue the sponsorship next year.

June to July – Previous exhibitors are contacted about sponsoring events in the upcoming Annual Meeting. Specialty Groups contact their membership to ask for recommendations of vendors who don't currently exhibit or sponsor at the Annual Meeting, and group leadership shares any suggestions with their staff liaison.

August to October – Staff and each group set realistic sponsorship goals during the budgeting process. Staff and each group decide who is the best point of first contact for new vendors.

February to March – Past exhibitors/sponsors not exhibiting at the year's conference are contacted about sponsoring.

Staff Contacts

For questions about sponsorships, contact meetings@culturalheritage.org.

Stipends

Speaker stipends are now in the same application form as scholarship and grant opportunities. This means that speakers can apply for all the possible forms of support at one time, and allows staff to coordinate directly with groups to ensure that everyone is aware of FAIC funding being offered.

Speakers will apply for funds by December 15. Any speaker that indicates an interest in FAIC funding will be considered by reviewers by January 15. The Education Manager will contact groups that offer stipends to alert them of the possible funding for their speakers after that date. Groups will then share their stipend decisions within 2 weeks of that communication; the Education Manager will inform all the applicants of the decision and/or award status once all decisions are made.

Resources

Beyond this handbook, we have many resources, both recorded and pdf format, that can help you in your role.
- Recorded Orientations in Learning platform
- Volunteer Resources section of the website
- Program Planning
  - [Recorded overview](#) and handouts
- Budget Prep Overview
  - [September 2022](#)
- Records Management
  - [How to use the community](#)
  - [Making accessible documents](#)
  - [Making accessible web pages](#)
  - [Guide for Records Management](#)

Change Log
V3.0, 04/11/2025, 07/09/2025, updated for 2025-2026 term, to reflect staff changes
V2.1, 02/04/2024, distributed to Volunteer Community for feedback
V2.0, 12/17/2023, distributed to AIC Board for feedback