GSF Policies and Procedures

Introduction

These Policies are an agreement between the Global Speakers Federation (GSF) Board of Directors and the Not-for-Profit Professional Speakers Associations that are members of the Federation. They articulate how to perform the business of the Federation by providing guidelines and the basis for certain procedures. GSF Policies define beliefs and philosophies and allow everyone to work in the same system and move forward together. These Policies are designed to create a climate of fairness and to promote equitable decision-making. They provide guidelines in the execution of GSF business by officers, representatives, members, and appointed staff.

The GSF Bylaw is the primary governing instructions and the Policies support and expand on the direction set in the Bylaw.

These policies were originally adopted July 2005 as part of the process of becoming an incorporated organization under US law. Prior to this, the Federation operated within the guidelines of the Mechanics Agreement (i.e., a document outlining the agreement between NSA-US and the member associations). A formal update to this document was made in March 2015, in July 2015, and then in January 2017 to align to the new Board structure and its updated Bylaw.

In January 2017, the GSF officially moved from the Executive Council model to a Board of Directors structured model and, with this, a new Bylaw was created and approved.

In March 2025, the GSF policies documents were moved to an online wiki format for ease of reference and maintenance.

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1. Membership

1.1 Individual Memberships

By virtue of membership in a GSF member association, the individual members of the member association are not considered members of the GSF. The member association is considered the member.

Individual members do not become members of other member associations, and they are not eligible to vote in other member association elections unless they choose to pay the dues of that member association and join as a member. Individual members are represented at GSF leadership meetings by delegates from each member association serving on the GSF Board of Directors.

1.2 Full Member Eligibility

A minimum of 40 Members is required to join the Global Speakers Federation. A Member is defined as a member of the association who: 1) has full voting rights; 2) is charged member rates at association events, and; 3) is eligible for member-only benefits. Full Membership eligibility requires the speakers association:

- Be an applicant for the time determined needed to verify eligibility for Full Member status
- Apply in writing for Membership prior to acceptance of the association as a Full Member Association
- Pay a non-refundable $1,995 USD Membership Application fee
- Meet the Membership requirements as determined by the GSF Board of Directors and outlined in this GSF Membership Policy
- Comply with the Policies and Bylaw of the GSF
- Uphold an image of integrity and have a written policy to enforce a Code of Professional Ethics
- Organize and implement educational events and programs for professional speakers
- Conduct its activities in compliance with the not-for-profit rules and regulations of the speakers association’s home nation.
- Conduct its administrative and marketing activities in a professional manner.

In July 2024, a 5-tier fee structure for GSF Membership Applications was implemented to offer a more feasible rate for associations wanting to join the Global Speakers Federation (GSF).

The structure follows the same guidelines we have established for GSF membership dues based on the GDP as published by the World Bank:

Word Bank Tier	**Membership Fee**
TIER 5 GDP USD 40,001+	No discount on membership fee, i.e. $1,995 USD
TIER 4 GDP USD 30,001-40,000K	a discount of 20% on the current fee i.e. $1596 USD
TIER 3 GDP USD 20,001-30,000	a discount of 40% on the current fee i.e. $1197 USD
TIER 2 GDP USD 10,001-20,000	a discount of 60% on the current fee i.e. $798 USD
TIER 1 GDP USD 0-10,000	a discount of 80% on the current fee i.e. $399 USD

When a new association applies for membership, the Presidential Leadership Team will evaluate that country's GDP. The GSF Executive Director will inform associations of the tier level for the fee they will be charged to submit their applications.

1.2.1 Membership Documentation

The following documents are required from a speakers association when applying for membership:

- Proof of not-for-profit organizational status
- Articles of incorporation or equivalent
- Bylaws, constitution, or equivalent
- Membership Roster
- Board of Directors and Officers list
- Schedule for officer rotation
- Election process or equivalent
- Proof of organization support for ethical guidelines of membership
- Code of Professional Ethics or equivalent
- Membership dues structure
- Most recent fiscal year's Revenue Over Expenses (i.e., Profit and Loss) Statement and a Balance Sheet

1.2.2 Membership Review Process

Speakers association applications for GSF membership are reviewed by representatives of the New Association Development Committee as appointed by the current GSF President. The representatives bring recommendations forward to the Steering Committee. During the review phase, the Committee evaluates the application documents and the general speaking experience of the speakers association's current members and membership requirements.

1.3 Affiliate Member Eligibility

An affiliate membership is available to those individuals, corporations, and partner organizations that are determined by the GSF to support the mission of the GSF and provide benefit(s) to the member associations. Affiliate Member eligibility requires the applicant:

- Apply in writing for Affiliate Membership
- Be an applicant for the time determined needed to verify eligibility
- Pay a non-refundable $1,995 USD Membership Application fee
- Act with integrity and support the mission of the GSF
- Organize and implement educational events, programs, or services for professional speaker associations
- Conduct its activities in compliance with their home nation's rules and regulations
- Conduct its administrative and marketing activities in a professional manner

1.4 Directory

The GSF shall not recommend or promote specific individuals as speakers. The GSF may maintain an online membership directory, which may be available to the public and supplied at this time by eSpeakers.

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2. Designations

2.1 Certification

The Certified Speaking Professional (CSP) designation and the FPSA (Fellow Professional Speakers Association) are recognized by the GSF as the official certifications of member speaking associations.

Historically, the CSP designation was conferred by NSA USA and PSA Australia. The FPSA is conferred by PSA UKI. In July 2024, APSS and VSAI were approved to confer the CSP designation, following the guidelines in section 2.4 below.

2.2 Global Speaking Fellow

In 2013, the GSF developed the criteria for a CSPGlobal designation and conferred its first class of 21 recipients during the 2013 Global Speakers Summit in December 2013. On January 13, 2016, the CSPGlobal designation was renamed to Global Speaking Fellow. The criteria of the Global Speaking Fellow are as follows:

The designation, Global Speaking Fellow, is conferred on those who have proven mastery of the core global speaking competencies over a minimum of three years, received favorable reviews by the clients who have hired them, demonstrated sustainability as a global presenter, presented professionally in a designated percentage of the macro geographical (continental) regions / geographical sub-regions as defined by the United Nations, and earned the favorable reviews of peers in the profession who hold the Global Speaking Fellow designation.

The first requirement of the Global Speaking Fellow application is that the applicant currently holds the CSP or FPSA. The CSP is conferred by qualified member associations of the GSF. In local markets, the CSP is the internationally recognized certification for professional speakers. The GSF also recognizes the FPSA designation conferred by PSA UKI.

For those who wish to expand beyond their local markets, the GSF makes available the educational content to guide those working across continents. The GSF confers the complementary global addition to the CSP and/or FPSA designation with the Global Speaking Fellow. In May 2020, the criteria were further defined to allow the applicant to provide virtual presentations as part of their submission.

All GSF member associations must recognize the Global Speaking Fellow as an earned designation. The GSF is committed to support the growth of member associations currently conferring the CSP/FPSA. The awarding process for the Global Speaking Fellow was reviewed and approved by the board on November 10, 2017.

2.3 Petition to Recognize Speaking Designations

Speakers associations may petition the GSF Steering Committee to have other professional speaking designations recognized. By a majority vote of the GSF Board of Directors, requested designations may be recognized.

2.4 GSF Recognition to Confer the CSP Designation

This process aims to ensure the standardization and equivalence of the Certified Speaking Professional (CSP) designation across all GSF associations. It addresses the Strategic Objective: Awards & Certifications-CSP Harmonization Process in the 2023-2024 GSF Strategic Plan.

Key areas that reinforce the GSF's commitment to excellence and uniform standards:

1. Honoring consistent standards for the CSP designation worldwide.
2. Protecting the CSP's credibility and value for stakeholders.
3. Facilitating mutual recognition among member associations.
4. Upholding the CSP's prestige through rigorous requirements.

Implementation Stages:

1. **Communication Plan:** (To be accomplished by January 2025.)
    1. Develop a comprehensive communication plan to ensure all GSF member associations understand the required standards and implications.
    2. Utilize communication tools such as the GSF website, policies, email, newsletters, webinars, workshops, Q&A sessions, and social media.
2. **Steps for Associations Wishing to Confer the CSP:**
    1. **Understanding the Requirements:**
        1. Associations meet with a member of the CSP Equivalence Committee to review documents, requirements, and the application process.
    2. **Application:**
        1. Associations complete the Application Form to Confer the CSP
        2. The association submits the completed form.
    3. **Review and Approval:**
        1. The CSP Equivalence Committee reviews the application for compliance with the GSF-CSP Harmonization Agreement required standards.
        2. The committee submits the application to the Steering Committee, recommending approval for consideration by the GSF Board.
        3. If approved, the GSF Board votes on recognizing the association's CSP designation.
        4. The Executive Director notifies the association of approval.
    4. **Review and Lack of Approval/Feedback and Resubmission:**
        1. If not approved, the CSP Equivalence Committee provides recommendations for improvement.
        2. Associations can reapply without waiting a year if adjustments are made to meet the requirements.
3. **Updates:**
    1. The CSP Equivalence Committee will revise the CSP Equivalence Agreement every three years.

This process only refers to the Certified Speaking Professional (CSP) Designation. It does not include the PSA-UKI Fellow Award.

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3. Awards

3.1 International Ambassador Award

GSF recognizes those who have made an obvious, substantial, and sustained contribution to the speaking profession and community through the International Ambassador Award.

It is not mandatory that there be a recipient every year. This decision will be made by the GSF President in consultation with the Presidential Leadership Team.

This award honors those who stand out from the many who have contributed to the development of the speaking business globally.

Call for Nominations:

Each GSF Association Representative can submit up to two (2) nominations and each GSF Past President can submit one (1) nomination using the International Ambassador Award online form.

Each nomination must include the reason for nominating each individual, their background, and justification.

Timeline:

- In a year with a Global Speakers Summit (GSS), the nominations must be submitted and voted on at minimum, two (2) months in advance of the GSS.
- In a year when there is no GSS, the nominations and vote must be completed at minimum, two (2) months before the Annual Board Meeting.

The Criteria:

Nominees do not have to come from a speakers' association's respective country.

Members of the GSF Presidential Leadership Team are not eligible for selection during their term of service.

In addition to their contributions to the industry and profession, nominees must be a member in good standing of one of the GSF member Associations and will have:

- Achieved success in their own business
- Earned a reputation for impeccable ethics
- Acquired significant experience speaking in a variety of countries
- Contributed to the cementing of member relations on an international level
- Represented/embodied the spirit and intent of our professional associations
- Worked to generate international goodwill and build a speaking community of respect, tolerance, and inclusiveness

- Served as a mentor of future leaders

Selection Process:

- It is recommended that each GSF association representative invite their Boards of Directors to submit nominees to them.
- The representative then nominates up to two (2) individuals on behalf of their association.
- The GSF Secretary or appointed staff member tabulates the nominations.
- Nominations and voting results will be collected and held in confidence.
- If any vetted nominee secures the majority of the nominations, that person is automatically the award recipient, and no vote is required.
- If no nominee receives the majority of the nominations, the three (3) nominees receiving the most nominations go onto the ballot for selection. In case of a tie for the top 3, the President consults with the GSF PLT to determine who goes on the ballot.
- If a vote is necessary, nominees are placed on the ballot alphabetically, including the information that was submitted with the nomination.
- Each Board Member* can submit one (1) vote for their top selection to receive the International Ambassador Award.
    - The Board is defined as the members of the PLT and a Representative from each member association.
- The GSF Secretary or appointed staff member tabulates the votes.
- The winner is announced at the Global Speakers Summit or the Annual GSF Board meeting in years without a Global Speakers Summit.

Past recipients of the GSF International Ambassador Award are:

- Delva and Norm Rebin HoF CPAE, (Canada) **19—**
- Somers White, CMC, CSP, CPAE, (U.S.A.) **19—**
- Max Hitchins, APS, (Australia) **2000**
- Warren Evans, CSP HoF, (Canada) **2001**
- Terry Paulson, PhD, CSP, CPAE, (U.S.A.) **2002**
- W. Mitchell, CSP, CPAE, (U.S.A. & Australia) **2003**
- Patricia Ball, CSP, CPAE, (U.S.A.) **2004**
- Kit Grant, BA, BEd, MEd, CSP, HoF,(Canada) **2005**
- Paul Bridle, CSP, (UK) **2006**
- David Price, CSP, (Australia) **2007**
- Dan Poynter, CSP, (U.S.A) **2008**
- Naomi Rhode, CSP, CPAE and Jim Rhode, CSP, (U.S.A) **2010**
- Alan Stevens, PSAE, FPSA, Global Speaking Fellow, (UK) **2013**
- Fredrik Härén, CSP, Global Speaking Fellow, (Singapore) **2018**
- Lindsay Adams, CSP, HoF, Global Speaking Fellow, (Australia) **2020**
- Paul ter Wal, LLM, CSP, Stentor, (Netherlands) **2021**
- John B. Molidor, CSP, PhD, (U.S.A.) **2022**
- Lenora Billings-Harris, CSP, CPAE (U.S.A.) **2024**

3.2 Beverly Babb Award

This award is created to recognize the service of individuals who have contributed strongly to the foundational growth of the GSF and/or the member associations. This award recognizes individuals

who typically serve “behind the scenes” without expectation of recognition or reward. They may not be well known across borders or even in their home association but have contributed extraordinarily to the growth, strength and substance of the organization.

There is no requirement that the award be bestowed each year. It is not necessarily an annual award but should be presented sparingly. The award may be presented during any of the GSF member association’s annual conventions or the Global Speakers Summit.

The award is bestowed to a member or staff person of a GSF association.

That person will have actively contributed a high-level of service for a minimum of three consecutive years.

Recipients must have maintained active membership or employment in their GSF association for more than four years cumulatively.

The recipient(s) of the award may be selected by the sitting GSF President and should be individuals that receive the strong endorsement of the GSF Presidential Leadership team. The GSF President may solicit suggestions from the Presidents of member associations but is not required to seek candidates.

The award can be presented for past service as deemed appropriate even if the recipient is no longer actively serving. The award may be bestowed posthumously.

Past recipients of the Beverly Babb Award are:

- Beverly Babb, CAE **2012**
- Claudia Haider **2013**
- Paul ter Wal, CSP, FPSA **2016**
- Bob Parker, CSP **2017**
- Lindsay Adams, CSP, HoF, Global Speaking Fellow **2018**
- Martin Laschkolnig **2019**
- Liz Weber, CSP **2020**
- Jonathan Low, CSP **2021**
- Catherine Palin-Brinkworth, CSP **2022**
- Sylvie di Giusto **2023**
- Sara Beth Reynolds **2024**

3.3 President's Award

Each year, the GSF President has the opportunity to present a special President’s Award. This award is presented to one person for outstanding and visible contributions to the Global Speakers Federation. There is no membership or time criteria associated with this award. The recipient may have been serving for less than a year and may or may not have been an association member. Their contribution was simply outstanding and very much appreciated during that presidential year.

Past recipients of the President's Award are:

- Sid Ridgley, CSP and Terry Brock, CSP, CPAE **2013**
- Kristin Arnold, CSP **2015**
- Scott Friedman, CSP, Global Speaking Fellow **2016**
- Dr. John B. Molidor, Ph.D., CSP **2017**

- Nabil Doss and Shari Bricks, GSF Executive Director **2018**
- Liz Weber, CSP **2019**
- Landi Jac, Mike Handcock CSP, Global Speaking Fellow, and the Plan B Summit Team **2020**
- Joni Peddie and Liz Weber, CSP and Zoom Communications **2021**
- Dr. John Molidor, CSP **2022**
- Neerja Singh **2023**
- Shari Bricks **2024**

3.4 Annual Award for Globally Known Names in Thought Leadership, Entertainment or Story-Telling (AKA The Lothar Award)

The GSF President can recognize a public person who has made outstanding contributions to society in the areas of Thought Leadership, Entertainment or Story Telling.

It is not mandatory that there be a recipient every year. This decision will be made by the GSF President.

Purpose of the Award:

- **Aligning with Strategic Plan - Raising Professional Standing of the GSF:** By issuing an annual award to a global player we are aligning our brand as being at that level. By listing these recipients on our website they are seen as aligned with GSF.
- **Recognition of Internationals at the Top of their game:** GSF will be able to run press releases around the recipients award, growing our audience, brand and that of the recipient.
- **A committee lead by the GSF President will determine who the recipient is:** They should run the chosen name by the PLT for feedback. In every case the concept is to hand the award over in person, and gain an interview for the GSF website and our associations to raise brand and recognition. Award winners may be invited to the GSS if appropriate.
- The inaugural committee will determine and document the initial guidelines for the award.

Benefits of the Award:

- GSF: Raises the brand positioning of GSF as an industry leader
- Member Associations: Aligns them via GSF with the best of the best globally

Considerations:

- · Association: We should steer away from political figures or otherwise divisive figures and the recipient should be someone that thought leaders globally would respect

Background:

- GSA Past President Dr Lothar Siewart CSP, Global Speaking Fellow, HoF: In 2010 he created a similar award issued by GSA. Recipients have included the Dalai Lama, President Obama’s sister

and in 2025 the past President of Luxomberg. It is a significant award and creates a highly professional and sought after place in the GSA’s offerings. Hence the proposal is to call it ‘The Lothar’ just like the Academy's are called 'The Oscar’

3.5 Voice of GSF Award

Purpose

The Voice of GSF Award recognizes an individual whose sustained service and contributions have significantly amplified the mission, values, and global presence of the Global Speakers Federation (GSF).

Scope of Contribution

Eligible contributions may include, but are not limited to, leadership and impact in the areas of:

- Strategic communication and storytelling
- Development of systems, tools, or frameworks that clarify GSF’s purpose or operations
- Advancement of alignment, visibility, and engagement across GSF associations
- Initiatives that strengthen how GSF is understood, experienced, and represented globally

Recognition is based on demonstrated impact and legacy rather than position, role, or title.

Frequency

The Voice of GSF Award is not required to be presented annually. It is reserved for exceptional, sustained contributions that meet the intent and standards of the award.

Authority

The Voice of GSF Award is presented at the discretion of the GSF President. No formal nomination process, scoring rubric, or standing committee is required.

Administration

- The award may be documented in GSF records at the discretion of the President or Executive Director.
- Presentation timing and format are determined by the GSF President.
- This award does not confer governance authority, voting rights, or formal status within GSF.

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4. Leadership

4.1 Representation

Directors serve as members of the GSF Board of Directors as a representative of their home member association's Board of Directors and serve a term of three (3) years. The initial schedule to provide for staggered terms of office is provided in Addendum G. A Director may serve a maximum of two (2) consecutive terms, and must retire from the Board for a period of at least one (1) year before he/she is eligible to serve on the Board again. Directors elected to officer positions shall not be subject to this regulation during their tenure as officers.

Member Associations are responsible for providing a representative to the Board of Directors, and notifying the GSF Executive Director of the appointment. It is recommended that the representative is a board member, a past-president or an ex-officio member of the Member Association board as the representative must be able to communicate regularly and efficiently with the Member Association's board.

All member associations have voting privileges. All member associations have a single representative who has a voice in GSF Board of Director meetings.

4.2 Voting Privileges

As per the bylaw Article VI Section 8, only Directors who appear in person, via video conferencing or similar digital platform, or has appointed their proxy may vote at GSF Board of Director meetings.

4.3 Attendance of the GSF President at Member Association Conventions

The GSF President has an annual budget for travel to member association events. GSF Member Associations are responsible for covering certain costs for the GSF President, or their designate, to attend their annual Convention including: convention (including gala or awards dinner), hotel accommodation, airport transfers, and any other event-related fees. The host Association will cover other costs as they deem reasonable and appropriate.

4.3.1 Considerations for Attendance of the GSF President at Member Association Conventions

Where a member association has an annual convention for their members and would like the President of the GSF, or failing that for practical reasons, another representative of the GSF Presidential Leadership Team, to be in attendance, the following considerations noted below need to be made.

The GSF President, or their designated representative, will visit the association's annual event to

support the leadership and educate the association's membership about the value and benefits of GSF membership. To that end, the President, or their designate, will give a presentation at the convention. A suitable time slot on the program is desired.

- There is a line item in the GSF budget for the travel expenses of the GSF President from their home location to the association’s convention city.
- GSF Presidents should know where and when each Member association will be holding their convention and if the GSF President (or designate) has been invited to attend. This is required for that person’s own personal and business responsibilities and to coordinate international travel requirements including where appropriate, best possible airfares, the applications of visas and/or other travel documents. Ideally, Member associations should at make their request to the President or their designate twelve months in advance, or no less then six months prior to the event date.
- The inviting association should be prepared to cover the following expenses of the President or their designate:
    - Convention Registration
    - Reservations for the gala or awards dinner
    - Lodging accommodations for the duration of the convention and related events (minimum of three nights, preferably at the same venue.)
- Where possible, the host association should organize transportation to/from the appropriate airport to the hotel. Should any other events or off-site trips be part of the program, it should be indicated to the President or his/her designate, if that event is included or not.
- As early as possible, the inviting association should confirm the following information.
    - When and where the convention will be held.
    - If there are additional events to which the GSF President, or their designate, is invited, for example special private parties for volunteers, international guest’s events, CSP-only events, then that information should be conveyed. Should they be scheduled on a day before or after the formal convention program, then that night’s accommodation should also be covered.
    - Whether the President will be collected from and returned to the airport or whether they need to make other arrangements.
    - Which meals, including breakfasts, will or will not be covered by the accommodation booking or the program.
    - An additional presentation by the President, or their designate, on their own field of expertise, is an additional opportunity that can be negotiated where appropriate.
    - Should it be desirable for the President, or their designate, to be a judge on a speaking competition, to be involved in handing out awards, or for them to be introduced to sponsors of the convention, that information is required before the event so that the President, or their designate, can prepare adequately.
    - Provide the contact details of the convention convener and anyone else who may be on the team to make arrangements for international guests.
- Should the association not have the budget to cover a visit from the GSF President, or their designate, or should the association not be planning to hold an in-person annual convention, then the President remains available to meet with the membership of the association via an online platform either at an online or a hybrid event.

4.4 Conflict of Interest

No member of the GSF Board of Directors, or any of its Committees, shall derive any personal profit or gain, directly or indirectly, by reason of their participation in the leadership of GSF. Each individual shall disclose to the GSF any personal interest which he or she may have in any matter pending before the GSF and shall refrain from participation in any decision on such matter.

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5. Officers

5.1 President

Per the Bylaw: The President shall be the Chief Officer of the GSF and shall preside at all meetings of the GSF Board of Directors and the Steering Committee. The President shall have general supervision of the affairs of the GSF, shall make reports as needed from time to time, and shall perform all such other duties as are properly required by the GSF Board of Directors. The term of the President will be one (1) year.

The GSF President is not a representative from any country. This person adopts a nonaffiliated role as the leader of the global organization. (The role of representing each member association is the responsibility of the GSF Board member from their respective member association.) The role of President is a four-year commitment: one year as Vice President, one as President-Elect, one as President, and one as Immediate Past President.

Duties of Federation President

- Coordinate communication between the member associations; facilitate and encourage communication across the GSF to ensure exchange of good ideas; be a global point of contact for member associations, prospective speakers associations and the media.
- Attend the annual conventions of the member speakers associations as feasible within the annual approved budgeted Presidential Leadership travel expense line.
- Convene and chair the annual business meeting of the GSF.
- Maintain an awareness of strategic issues happening in each member association.
- Provide a tie-breaking vote, should one be needed, at a GSF Board of Directors meeting.
- Identify and initiate mechanisms to address issues of concern to the global community of members.
- Identify, encourage and support potential new member associations and steer their applications through the membership process.
- Help identify potential future GSF leaders around the world.

5.2 President-Elect

Per the Bylaw: The President-Elect shall exercise the functions of the President during the absence or disability of the President. The President-Elect shall have powers and discharge such duties as may be assigned to the office from time to time by the GSF Board of Directors. The term of the President-Elect will be one (1) year.

5.3 Vice President

Per the Bylaw: The Vice President shall exercise the functions of the President-Elect during the absence or disability of the President-Elect. The Vice President shall have powers and discharge such

duties as may be assigned to the office from time to time by the GSF Board of Directors, including the duties of Secretary and Treasurer. The term of the Vice President will be one (1) year.

5.4 Immediate Past President

Per the Bylaw: The Immediate Past President shall serve as an ex-officio member of the GSF Board of Directors and perform such other duties as may be prescribed by the President and/or the GSF Board of Directors and this Bylaw. The term of the Immediate Past President will be one (1) year.

5.5 Executive Director

Per the Bylaw: The Executive Director shall serve as an officer and ex-officio member of the GSF Board of Directors and all Committees. The Executive Director shall be compensated for their duties as outlined in the Service Level Agreement. The Executive Director will serve for the term of the Service Level Agreement.

5.6 Secretary

Per the Bylaw: The Secretary shall issue notices for all meetings, shall keep minutes of all meetings, and keep the historical documents of the GSF. In the absence of a Secretary, duties may be delegated as required from time to time. The Secretary shall perform all duties incidental to the office or which are properly required by the GSF Board of Directors. The term of the Secretary will be one (1) year.

The duties of the Secretary are delegated to the Executive Director.

5.7 Treasurer

Per the Bylaw: The Treasurer shall have the custody of all monies and securities of the GSF and shall keep regular accounts. The Treasurer shall disburse the funds of the GSF in payments of just demands against the GSF or as may be ordered by the GSF Board of Directors, taking proper vouchers for such disbursements, and will render reconciled accounts covering each fiscal year and a quarterly report of all transactions. In the absence of a Treasurer, duties may be delegated as required from time to time. The Treasurer shall perform all duties incidental to the office or which are properly required by the GSF Board of Directors. The term of the Treasurer will be one (1) year.

The duties of the Treasurer are delegated to the Executive Director.

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6. Nominations and Elections

6.1 Vice Presidential Nomination and Election

6.1.1 The Vice President Nominating Committee

Per the Bylaw: The Nominating Committee shall bring forward a ballot of at least two (2) candidates and no more than three (3) candidates for the officer position of Vice President. The Nominating Committee will be chaired by the Immediate Past President and comprised of up to four additional members. The additional members will be selected by the Immediate Past President, and endorsed by the Board of Directors. These committee members must have served on the former GSF Executive Council or on the GSF Board of Directors within the last five years. Additionally, the committee members will represent the global diversity of the various Member Associations.

6.1.2 Nomination of Vice President Candidates

A call for nominations for the position of Vice President will be distributed to the Representatives of the member associations within four months prior to the GSF annual meeting with a notice of the call distributed to the GSF Board of Directors.

Vice Presidential candidates must be a current member of the GSF Board of Directors with at least one (1) year of GSF board service and in good standing. The name(s) submitted must meet the nomination criteria with relevant background information – see procedure document in Addendum C for guidance on relevant information.

The submission from a Board member must be a self-nomination.

The GSF Executive Director will collect and send the nomination materials to the Nominating Committee at least three months prior to the GSF annual meeting. Having identified the candidates, the Nominating Committee will carry out due diligence to ensure that the candidates they recommend to the GSF Board of Directors will be suitable for the position. The Nominating Committee will put forward at least two (2) and up to three (3) nominee recommendations. Each member of the Nominating Committee, including the chair, has one vote to establish the two to three nominees.

6.1.3 Vice President Candidate Due Diligence

The Nominating Committee will contact the candidates to verify their intent to serve if selected.

6.1.4 Vice President Election Process

An electronic ballot will be sent to each GSF Board Member, which will contain a video interview with each candidate conducted by the Nominating Committee chair.

There will be no campaigning allowed by or on behalf of the candidates. This includes (but is not

limited to) letters, flyers, electronic mail, phone calls, and any form of soliciting votes in support or promotion of a candidate.

If a violation is observed or reported, the Nominating Committee chair will advise the GSF President who will call an emergency meeting of the GSF Board of Directors to consider the removal of the candidate from consideration.

6.1.5 Vice President Voting Process

The election process of the Vice President will take place via a secret electronic vote prior to the GSF annual meeting.

Each voting member of the GSF Board of Directors holds one vote for the position of Vice President. The nominee who receives the majority of votes for the position of Vice President will be deemed elected, using the process noted below.

- If there are two (2) nominees being put forward, the individual receiving more that the majority of votes will be deemed elected. If there is a tie, the current GSF President will cast the deciding vote.
- If there are three (3) nominees being put forward, the individual receiving more than the majority of votes will be deemed elected. If there is not a majority reached on the first round of voting, the individual with the lowest number of votes will be removed from the ballot and second vote will be taken. The individual receiving more than the majority of votes in the second round will be deemed elected. If there is a tie of two (2) candidates on the second round of voting, the Chair of the Nominating Committee will cast the deciding vote.

6.1.6 Vice President Succession

The transfer of leadership positions officially takes place at the close of the annual convention at which the GSF is holding its annual meeting. The Vice President will serve for one year in that position, followed by one year as President-Elect, followed by one year as President, and followed by one year as Immediate Past President.

6.2 Steering Committee Nominations and Election

6.2.1 The Nominating Process for Steering Committee members

A call for nominations for the two non-determined Steering Committee positions will be distributed to the GSF Board of Directors at least 30 days prior to the GSF annual meeting. During the 30 days leading up to the GSF annual meeting, nominations will be accepted from member associations. Nominations will also be accepted from the floor during the GSF annual meeting.

6.2.2 Election of Steering Committee members

During the appropriate portion of the GSF annual meeting, the GSF President will:

- Confirm the three (3) Steering Committee members representing the three (3) largest associations by membership count with the Executive Director, based on paid membership numbers 30 days prior to the AGM. To qualify as one of the three largest associations, an association must be GSF full members for at least five (5) years.
- Confirm that those candidates who are nominated for the remaining two positions on the Steering Committee are willing to serve.
- Allow each nominee three (3) minutes to speak to their desire and capabilities to serve on the Steering Committee.
- If there are two or less nominees, the GSF President will state “If there is no objection, we will accept the nominations as presented.” If no objections are heard, the President states, “Since there is no objection, the nominations are hereby accepted.”
- If there are more than two nominees, the President will call for a secret vote of the Directors. The Executive Director will collate the votes and the two nominees who receive the most votes will be elected. In the case of a tie, the Executive Director will ask the President to cast a tie-breaking vote. Once the voting is complete, the Executive Director will announce the results of the election to the GSF Board of Directors.

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7. Global Speaking Fellow

GLOBAL SPEAKING FELLOW: APPLICATION OVERVIEW & PROCESS

A Global Speaking Designation

(December 2023)

7.1 BACKGROUND AND OVERVIEW

The Global Speakers Federation (GSF) is the world-wide professional body serving the interests of their member speaker associations, advancing speaking globally, and connecting the professional speaking community globally. In alignment with the GSF mission, working with member associations, and in response to the expanding international nature of the needs of global speaking members, international clients, and global audiences, GSF has established the framework for a designation that recognizes professional speakers successfully presenting at a global level.

The Global Speaking Fellow is conferred by the individual's home association on members who hold the Certified Speaking Professional (CSP) designation or the Fellow of the Professional Speaking Association (FPSA) and who have sustained a successful speaking business across numerous global geographical regions. The designation Global Speaking Fellow indicates recognition by peers and clients of global speaking competence and experience. **For purposes of this document, the notation "CSP" in subsequent sections includes approved equivalent designations of the GSF member associations including FPSA of PSA UKI, CSP of PSA, CSP of NSAUS, CSP of APSS and CSP of VSAI.**

Support for high-level professionalism in the global speaking profession promotes the wider use of accomplished professional speakers and expands the credibility and value of all global speakers. Bringing value to the global meetings industry supports effective partnerships between speakers and those who hire them and it fosters confidence in the markets of GSF member associations and emerging speaking associations. This confidence plays an increasingly important role as a driver and facilitator of the adoption and high-quality implementation of high standards in those regions of the world with emerging markets for professional speaker services.

7.2 VALUES, MISSION, AND STRATEGY

This designation comes from the alignment of GSF organizational Values, Mission, and Strategy. The GSF Three Pillars Strategy document (Appendix A) provides the tactical direction for the work of the Federation and is based on the following foundations:

Values: Growth and enhancement of the speaking profession is best served by continually enhancing the talent, ethics, and business acumen of individual associations and practitioners.

Mission: The GSF is a global framework for independent speaking organizations to collectively serve the interests of their individual members while advancing and connecting the professional speaking community worldwide.

Strategy: The GSF is a mechanism of affiliation through which independent associations for professional speakers around the world can serve these interests by providing members with greater access to professional education materials and access to one another’s educational programs.

This designation is a leading indicator that a professional speaker who has earned the Global Speaking Fellow is competent in the core competencies unique to global speaking. The competency structure was developed with the input of global speakers and global meetings industry professionals and is designed around the professional skills and behaviors demonstrated by a successful global presenter.

7.3 HISTORY

Since its formation in 1997 (and official launch in January 1998), the GSF has been serving its member associations with a mechanism for sharing resources and providing affiliation among independent speaker associations around the world.

In 2012, the GSF leadership advanced a strategy to deliver educational content unique to the work of a global professional speaker. Leadership began developing the body of knowledge around a successful and sustained global speaking professional working across international regions and continents. This body of knowledge advances the professional development opportunities of those seeking to expand their speaking business on a global scale and provides the framework to evaluate competency in the field of global speaking. Originally called CSPGlobal, the first class of 23 recipients was conferred during the 2013 Global Speakers Summit in Vancouver. Subsequently, after discussion, the GSF Executive Council approved to change the name to Global Speaking Fellow in January 2016.

Support of high-level professionalism in the global speaking profession promotes the wider use of accomplished professional speakers and expands the credibility and value of all presenters. To that end, the GSF has undertaken the work to identify the competencies and standards of a professional global speaker, to promote the high standards, to recognize those who achieve the standards, and to foster collegial and supportive networks within the community of CSPs working on a global level.

7.4 COMPETENCY FRAMEWORK

Successfully working across continents as a global presenter requires business acumen, specialized knowledge, and mastery of key competencies unique to presenting in global markets. The key competencies of a successful global speaker and the component elements of these competencies are a part of the body of knowledge and educational content developed exclusively by the GSF. The GSF seeks to deliver educational content and tools that will improve the success of global professional speakers, reduce risks for international clients, and increase value for global audiences.

With the input of global meeting professionals, international bureaus, global speakers, and research data that explored the standards for conferring global designations by associations across professions and industries, the GSF identified four core competency areas of global speaking:



These competencies provide the framework for evaluating mastery of a speaker's capabilities in global markets. The measures of continued success in global markets, the input of those who hire professional speakers, and the assessment of the knowledge the speaker conveys are combined to determine an applicant's grasp and capability within the competencies. Only the top-rated competencies are utilized in the evaluation of the applicant's suitability for the designation. The full list of identified competencies appears in this document (Appendix B) and may be utilized to create an educational curriculum that can be made available to speakers interested in pursuing work as an international speaker. Each competency has several components that were developed by key professionals, under the guidance of an education committee, into modules to help professional speakers learn from the experience and insight of others. Each competency list is arranged in order of importance as determined through surveys and interviews. Those competencies ranked highest are a part of the Global Speaking Fellow assessment criteria.

Competency 1: Global Communication Competency

- Customize content for appropriateness and applicability
- Demonstrate sensitivity to culture and manage communication appropriateness
- Work successfully with interpretation professionals and communication technology - both simultaneous and delayed
- Customize delivery style, both in-person and/or live virtual presentations, for place and culture

Competency 2: Global Business Competency

- Adhere to global business conduct standards and maintain high integrity
- Navigate the unique realities of networking in global markets
- Market and sell services in global markets
- Identify and work with promotion and media relation professionals worldwide
- Understand the expectations and the difference between being hired in a location or sent to a location

Competency 3: Global Events Competency

- Understand local traditions and how those will impact the event and presentations, in-person and/or live virtual
- Maintain awareness of planner and client expectations that differ from home events
- Manage the nuances of scheduling for events and how to adjust in the moment
- Know the protocol for interacting with attending dignitaries

7.5 CRITERIA TO EVALUATE COMPETENCE

The Global Speaking Fellow designation is conferred on those who have proven mastery of the core competencies over a minimum of three years, who have received favorable reviews by the clients who have hired them, who have demonstrated sustainability as a global presenter, who have presented professionally in a designated percentage of the macro geographical (continental) regions / geographical sub-regions as defined by the United Nations, or have spoken in 25 separate countries, and who have passed an internal review by an evaluation team composed of Global Speaking Fellows.

7.6 APPLICATION PROCESS

Applicants apply through their member association, who, in turn, verify that the candidates currently hold the CSP designation, are a member in good standing, and have no outstanding ethics violations or other sanctions by their member association in the last 60 months. The evaluation is performed by the Global Speakers Federation. Upon approval, the designation is conferred by the member association. The process flow is documented in Appendix E.

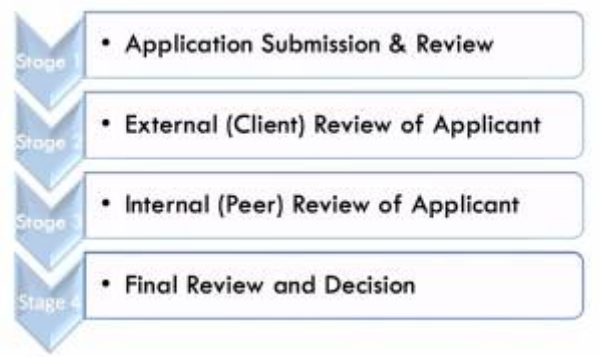
The application process is designed to determine if an applicant has met the standards and criteria of the Global Speaking Fellow designation. CSPs who achieve this global designation may display the mark on their collateral materials and notify the hiring public that they are a Global Speaking Fellow with GSF-verified global speaking experience and competence.

Applicants must demonstrate proficiency in each competency area through submitted evidence documenting their attainment of the experience standards, through client evaluations, and through peer verification that they have mastered the competencies. The rigorous multi-stage process is confidential to the participants involved and is managed primarily through online mechanisms. All applicants also agree to uphold the global speaking Code of Conduct. This Code supplements the Code of Professional Ethics provided through the GSF membership associations.

The application and client evaluation process are designed to support the determination of the appropriateness for conferring the Global Speaking Fellow designation on those global professional speakers who have achieved the standards of the designation and exhibited mastery of the global presenter competencies. The final part of the process involves an internal review of the applicant’s submitted materials and video. The internal review is performed by global speakers from the pool of Global Speaking Fellow designation holders.

The application follows a multi-stage process and each stage has a number of component elements that are verified, reviewed, and tested.

7.6.1 THE STAGES OF THE APPLICATION PROCESS



Each stage of the application must be successfully completed prior to moving to the next stage. The process takes approximately three months to complete from the date of application submission. The application stages have a number of specific parts and these are listed below.

Stage 1: Application Submission & Review

Part 1: Applicant Information – contact information, CV/resume, areas of expertise, membership information

Part 2: Global Speaking Experience – dates, regions, contact information, fees (note that an independent audit is performed)

Part 3: Adherence to Professional Integrity – signature check on Code of Conduct

Part 4: Link to applicable video footage (or equivalent) of applicant

Part 5: Submission of administrative application fee

All forms for the Application Submission are provided via member's home association Website or can be obtained at the GSF website submission portal. The forms include detailed instructions to assist in their completion. The Application Submission is completed though the secure GSF website portal, which is usually linked to the member's home association website.

Applicants may be asked to provide detailed information on specific engagements, in-person and/or virtual, within their application. By submitting an application, the applicant agrees to make available the requested documentation to an independent GSF staff person reviewing the application. The GSF staff person is not a member of GSF and all fee information provided is confidential. All documents will be held securely.

Once Stage One is completed and Application materials are verified, and if a pass is issued, the External (Client) Review Process is initiated.

Stage 2: External (Client) Review of Applicant

The External Review consists of a standardized evaluation form that will be sent to a random selection

of global clients provided in the Application submission process. The responses to this form are assessed by the evaluation team. Once Stage Two is deemed as passing, the application is moved to the Internal (Peer) Review Process.

Stage 3: Internal (Peer) Review of Applicant

The Internal Review consists of the evaluation team assessing the submitted materials and video. If additional questions or clarifications are required, a verbal interview may be scheduled with the applicant.

Stage 4: Final Review and Decision

The information from Stages 1, 2 and 3 are provided to the GSF Global Designation committee who will render a final decision. The applicant and home association will be notified of the final decision. Recognition of the achievement will ideally take place during their home association's annual convention and/or during a Global Speakers Summit.

***Global Speaking Fellow*: Experienced, Credible, Globally Competent**

APPLICATION STAGES DETAIL

Stage One: Application Submission & Review

The home association qualifies that the applicant is a CSP, is a member in good standing, and has no outstanding ethics violations or other sanctions by his/her member association in the last 60 months. The application then goes to the GSF where it is determined if the applicant is speaking professionally on a global level. This is done by verifying the completed engagement form indicating speaking experience specific to the applicant's global work over the last 60 months. All engagements must be fee-paid and/or consist of same day product sales.

Stage One includes the following:

- A minimum of 36 in-person and/or live virtual presentations in the most recent 60 months prior to application. Pre-recorded presentations do not qualify.
- Presentations must span a minimum of three (3) of the five (5) major groups identified by the United Nations, with a minimum of two (2) countries in each region (see Appendix D) -or- having spoken in 25 separate countries. For live virtual presentations, the country the majority of viewers are located in will be considered the target country for the presentation.
- Link to online video(s) – at least one for each format (i.e., in-person or live virtual). The video(s) must be an unedited and continuous for at least 30 minutes.
- All engagements listed are paid, either through a fee or product sales the same day of the engagement, and the applicant must submit documentation to the independent GSF staff person to verify engagements and income. The GSF staff person will randomly select engagements for the audit.

Stage Two: External (Client) Review of Applicant

The GSF will determine that the applicant is speaking and meeting client expectations on a global level. This is done by verifying client satisfaction and feedback via an external evaluation form on presentation work or equivalent.

Stage Two includes the following:

- Response from at least 20 clients to an online evaluation of the applicant.
- The External Review follows a set of performance criteria and is scored based on specific behaviors. that meet the criteria (e.g., such as speed of speech when working with interpreters, gestures and movement, references, and word choice).

Stage Three: Internal (Peer) Review of Applicant

The GSF will determine that the applicant has a mastery of the global speaking competencies. This is done through a review and an assessment of the submitted materials (except for fees) and the submitted video by the evaluation team. If there are questions or concerns on the part of the evaluation team, then a knowledge assessment interview (where the applicant answers questions verbally) may be conducted.

Stage Three includes the following:

- Review submission of an unedited and continuous video of the presenter of at least 30-minutes in length with a minimum of one for each type of presentation (i.e., in-person and virtual).
- The evaluation team independently evaluates the applicant’s submitted video(s) and submits an online evaluation of the applicant.
- If required, a 30-minute verbal knowledge assessment interview of the core competencies will be made and will be designed to verify that the applicant has a firm grasp on the nuances of globally speaking under a variety of conditions. The assessment will be scored based on the weighted value of the competency elements.

Stage Four: Final Review and Decision

The GSF Global Designation committee will review all the material and evaluations from Stages 1, 2 and 3 and will render a final decision.

Stage Four includes the following:

- If a decision is made that candidate has been approved, the candidate is notified and their home association is notified. The formal notification letter and conferment is made by the candidate’s home association.
- If a decision is made that the candidate is not approved, the candidate is notified.

INCOMPLETE APPLICATION

Based on the information provided on the application, an applicant may not meet the minimum

standards to advance to the review and assessment stage. An application will be denied if it is incomplete, does not reflect the applicant's most recent professional experience (i.e., the application represents a timeframe outside of the recent 60 months), the information is misrepresented, and/or the supporting documentation is not supplied when requested. The list of presentations is to be submitted in English. If an application is incomplete, the applicant will be notified and have 30 days to correct the application, staying within the same timeframe represented in the application, and can resubmit without additional fees. If the application remains incomplete after the 30 days, the applicant must start over and must complete the submission process representing the updated time frame.

Applications containing misrepresented information will result in the disqualification of the applicant.

FEES, CONFIDENTIALITY, AND RENEWAL

Fees

By submitting an application, the applicant agrees to adhere to the Code of Conduct and submit a $995 USD application fee. $50 USD of the fee is forwarded to the member association.

Confidentiality

The identity and information concerning all applicants is confidential. Peer reviewers and verbal knowledge assessment providers are required to sign a confidentiality and non-disclosure agreement before participating in the process. No peers will review the submitted financial and client data of an applicant.

Designation Renewal

The Global Speaking Fellow designation is granted for a five-year period, after which the global speaker must renew the designation through demonstration of maintaining CSP membership, continued professional development, and commitment to the profession by contributing to the best-practice content library for the advancement of excellence in global speaking. After one renewal and after the age of 70, the designation is considered to be continuous.

PROFESSIONAL CODE OF CONDUCT

Global Speaking Fellow presenters agree to abide by the GSF Code of Conduct for Global Speakers. The GSF requires adherence to this Code as a condition of the designation. The purpose of the Code is to assure clients that designation holders are committed to maintaining their professionalism and adhere to high standards in the conduct of providing services to clients and in their dealings with their international audiences.

Global Speaker Professional Code of Conduct

As a Global Speaker, I pledge to:

- Serve clients with integrity, competence, and professionalism.
- Accept only those engagements for which I possess the appropriate experience and competence to provide the services requested.
- Treat appropriately all confidential client information.
- Agree in advance with a client on the basis for fees, expenses, payment, and the process for managing cancelations and refunds.
- Respect the rights of speaking colleagues and other presenters and never use their proprietary information, stories, examples, and materials without permission.
- Respond courteously and respectfully when turning down any opportunity that does not fit with my personal ethics or legal requirements.
- Respect the cultural norms and requests of clients and audiences by removing images and language from presentations that are not a fit.
- Respect interpretation professionals and treat them as valuable partners in delivering presentations.
- Respect the meeting professionals and support their work to deliver a high-quality program.
- Represent the global speaking profession with integrity and professionalism.
- Apply the Global Speaker Professional Code of Conduct equally in all markets.

MARKETING AND TRADEMARK

The successful marketing of this designation will be achieved through the clear focus on the value propositions of the designation to clients, audiences, and speaking professionals communicated consistently across all communication channels available to the GSF including all member associations. A badge has been created that may be used by all Global Speaking Fellows for their own purposes on websites, social media, letterheads etc.

These channels include: the GSF website and the support of member association websites and publications, the relevant content feeds and articles provided to meetings industry websites and publications, and the global speaking members themselves with their websites and collateral material. Additionally, social media, word of mouth, and other forms of emerging channels will be leveraged with stories and videos of success from Global Speaking Fellow speakers.

The promoted value propositions will address how the designation directly advances the work and goals of the key stakeholders including: global meetings industry professionals, potential applicants, and future potential applicants. The value propositions will focus on outcomes, not on how to achieve the designation. In the limited attention bandwidth available from potential applicants, the GSF will deliver a few simple, repeatable, and clearly focused key messages through stories, testimonials, and examples.

For meetings industry professionals, the key messages revolve around support for lowering their risk and improving their outcomes. For designation holders and potential applicants, the key messages explain how the designation brings value to them as a professional in the global meetings industry and how they will be a part of the cohort of professionals at the forefront of advancing the art and value of global presenting. How to actually achieve the designation will be secondary to the why they will want to pursue it. Simple videos can explain the application process and all communication will be

fully focused on why it is important.

For the marketing of the designation, value statements directed at the key stakeholders will be developed and promoted through all GSF communications efforts. Sample value statements may include one or two of the following for each target group:

Meetings Industry Professionals and Organizations

- Reduces risk through verified competence level of designation holder
- Establishes and supports a professional code of conduct
- Provides an useful filter in hiring decisions and in identifying qualified speaking professionals
- Increases confidence in the abilities of the speaker
- Demonstrates commitment to competence and excellence
- Defines standards within the global speaking profession
- Advances the profession and creates a common understanding between speakers and those who hire them
- Increases cooperation and support between organizations in the disciplines of the meetings industry
- Provides a means for the profession to self-regulate
- Increases the likelihood of achievement of event goals

Designation holders:

- Provides recognition and credibility
- Enhances professional reputation
- Displays personal accomplishment
- Demonstrates a high level of commitment to the profession on a global level
- Validates skills and knowledge
- Feassures local governmental agencies when issuing visas

Potential applicants:

- Provides all of the above items plus -
- Creates professional development opportunities
- Displays a roadmap for global speaking skills development
- Includes admission into an elite segment of the speaking profession

Audiences:

- Demonstrates respect for local culture, language and norms
- Increases confidence and belief in the validity of professional speaker
- Demonstrates commitment to the highest level of audience experience
- Indicates dedication to audience satisfaction

ADMINISTRATION

The entire administration system will be paperless and will be managed in the English language with translation technology utilized as needed. Technology, already being used by many credentialing and certifying organizations, will be deployed to manage the process. Some elements of the system may be administered through programs such as FormStack or other capable and affordable technologies.

A central staff administrator will oversee and maintain the system at an estimated combined five hours a month during usual times. At peak times (in the lead up to a deadline for recognition at a specific event), volume may increase and require ten hours a month of general administration.

Volunteers will make up the bulk of administrators in the process within the online review and assessment process. The central administrator will be responsible for assisting with scheduling and file transfers as well as overseeing the independent auditor verifying the applications at two to three hours per application. This work is clerical in nature and will require oversight of the GSF Executive Director to simply assure compliance with confidentiality and process.

CONCLUSION

Professional designations aim to provide many benefits to the professions they support and to society as a whole. The Global Speaking Fellow designation has been created using the guiding principles advanced by the Institute for Credentialing Excellence and the belief that by bringing value to the global meetings industry, the GSF brings value to its member associations.

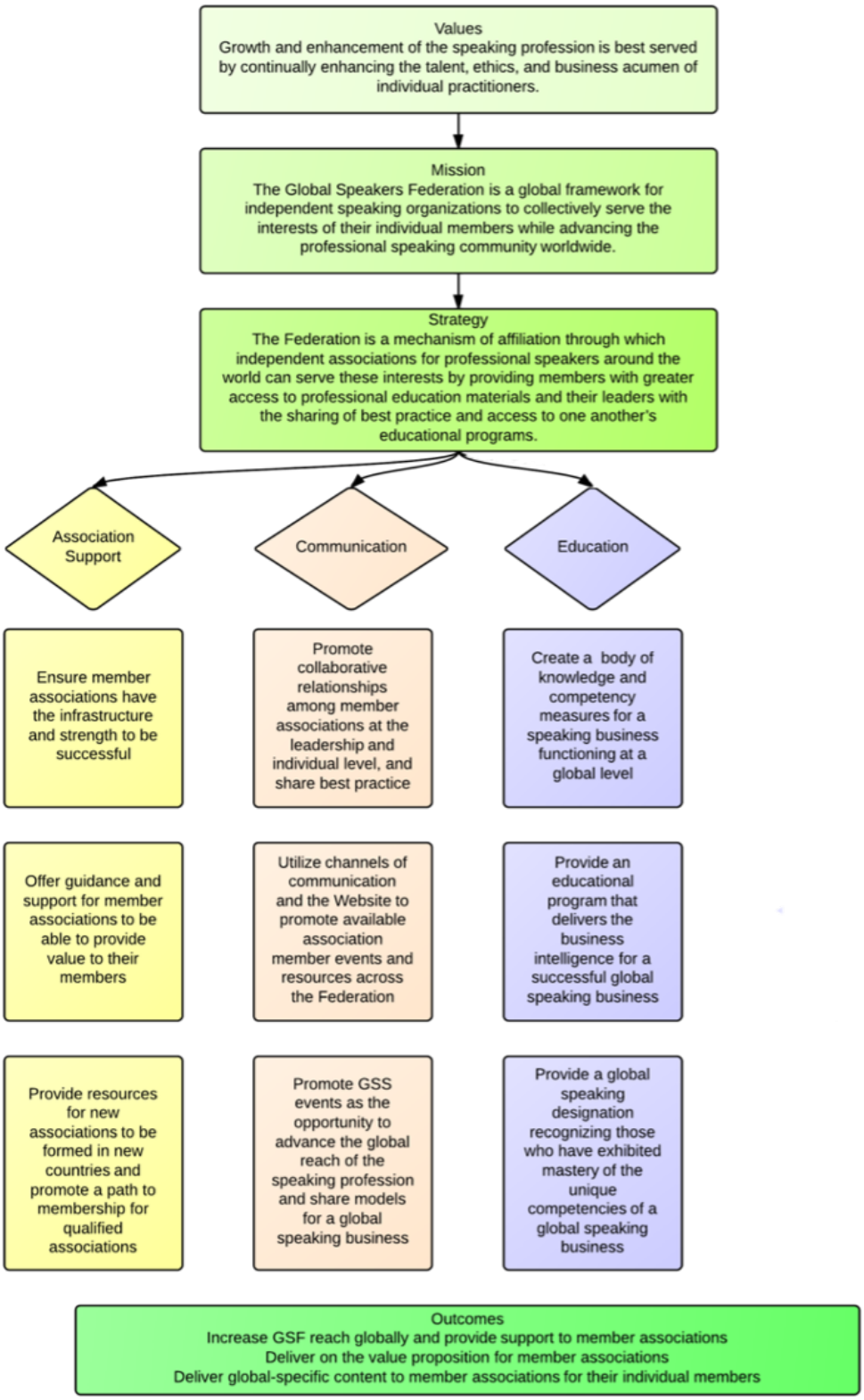
The Global Speaking Fellow will be achieved through specialized and advanced experience within the core competencies and the body of knowledge advanced by the GSF. Additionally, the Global Speaking Fellow designation promotes an additional level of standards of conduct related to working in global markets.

The Global Speaking Fellow designation is the leading indicator that a professional speaker has met the standards of a global speaker and exhibits mastery in the global speaking competencies. These competencies are the framework that captures the basic skills, knowledge, and behaviors global speakers must demonstrate in order to successfully meet the needs of clients and audiences in a wide variety of environments around the globe.

The GSF proudly supports and promotes the value of a designation such as the Global Speaking Fellow.



APPENDIX A - THREE PILLARS STRATEGY



APPENDIX B – THE CORE COMPETENCIES: AN OPPORTUNITY FOR EDUCATIONAL CONTENT DEVELOPMENT

Each competency has several components to be developed, by key professionals under the guidance of the GSF Education Committee, into modules to help professional speakers learn from the experience and insight of others. The resulting modules will become the educational content of the GSF.

Competency 1: Global Communication Competency

- Customize content for appropriateness and applicability
- Demonstrate sensitivity to culture and manage communication appropriateness
- Work successfully with interpretation professionals and communication technology - both simultaneous and delayed
- Customize delivery style for place and culture
- Provide context through research of local issues, news and cultural mediation services
- Maintain high interpersonal awareness for mitigating distracting mannerisms and colloquialisms
- Convey content through translation services
- Select clothing fitting for local standards of modesty and customs
- Identify resources for props and slides review to understand how to work within cultural differences

Competency 2: Global Business Competency

- Adhere to global business conduct standards and maintaining high integrity
- Navigate the unique realities of networking in global markets
- Market and sell services in global markets
- Identify and work with promotion and media relation professionals worldwide
- Understand the expectations and the difference between being hired in a location or sent to a location
- Identify appropriate channels for publishing and distributing content
- Select the appropriate system for payments and transactions
- Understand the laws and protections of intellectual property rights on a global scale
- Identify the right management systems for business copyrights and trademarks
- Know the parameters of local contract negotiations and set appropriate expectations
- Understand the global business ramifications, both home and abroad, around fraud and legal issues
- Understand how to hire experts to manage tax implications, both at home and abroad

Competency 3: Global Events Competency

- Understand local traditions and how those will impact the event and presentations, in-person and/or live virtual
- Maintain awareness of planner and client expectations that differ from home events
- Manage the nuances of scheduling for events and how to adjust in the moment
- Know the protocol for interacting with attending dignitaries
- Identify appropriate resources for research to support successful delivery of content
- Utilize pre-event briefing checklists with contacts and clients
- Work with local publishing processes for program materials
- Know the type of staging technology that will be used and what to do if it does not work
- Work across multiple technology platforms for presentation audiovisuals

- Know how to locate information about systems-voltage and connectivity prior to the event
- Understand the local power grid availability and managing around challenges

APPENDIX C – FREQUENTLY ASKED QUESTIONS

Who will be responsible for the reviews and assessments?

Volunteer peer reviewers and verbal knowledge assessors will be drawn from the pool of Global Speaking Fellow recipients. These designation holders will provide the reviews and assessments to ensure the applicants are presenting capably at a global-level. A minimum of ten initial qualified recipients will be identified by a panel of Past Presidents of the GSF and confirmed by the GSF Board of Directors. GSF board members are removed from the list to eliminate potential conflict of interest challenges.

How will the educational content identified during this process be developed and will applicants be required to attend these educational programs as part of the application process?

The development of the educational content around the identified competencies is separate from the designation. Applicants will not be required to participate in an additional educational programs beyond those required for CSP to achieve the designation.

How will adherence to the Professional Code of Conduct be monitored and what consequences for non-compliance will be imposed?

If a complaint is charged against a Global Speaking Fellow member, the GSF Board of Directors will convene an ad hoc committee, led by a GSF Past President, to evaluate the allegations. Where the allegation matches a code principle in the member home association, the matter will be referred to the member association for a ruling. In those circumstances where the code principle is exclusive to the GSF Code of Conduct, the ad hoc committee will evaluate the matter and determine a ruling. In both cases, an affirmative violation ruling will lead to a determination of consequence and whether or not revoking the Global Speaking Designation is warranted. Recommendations to revoke or apply other sanctions are referred to the Board of Directors for a vote and action. The GSF will not revoke a CSP designation as that is a matter for the home association to evaluate.

How will the new designation be marketed?

A brief overview of the strategies, channels, and key message development is included on page 11 of this document. It is recommended that the tactical marketing plan for marketing the Global Speaking Fellow will be expanded and documented by a designation marketing subcommittee of the GSF Communications Committee.

How will the intangible nuances of successfully speaking at a global level be evaluated?

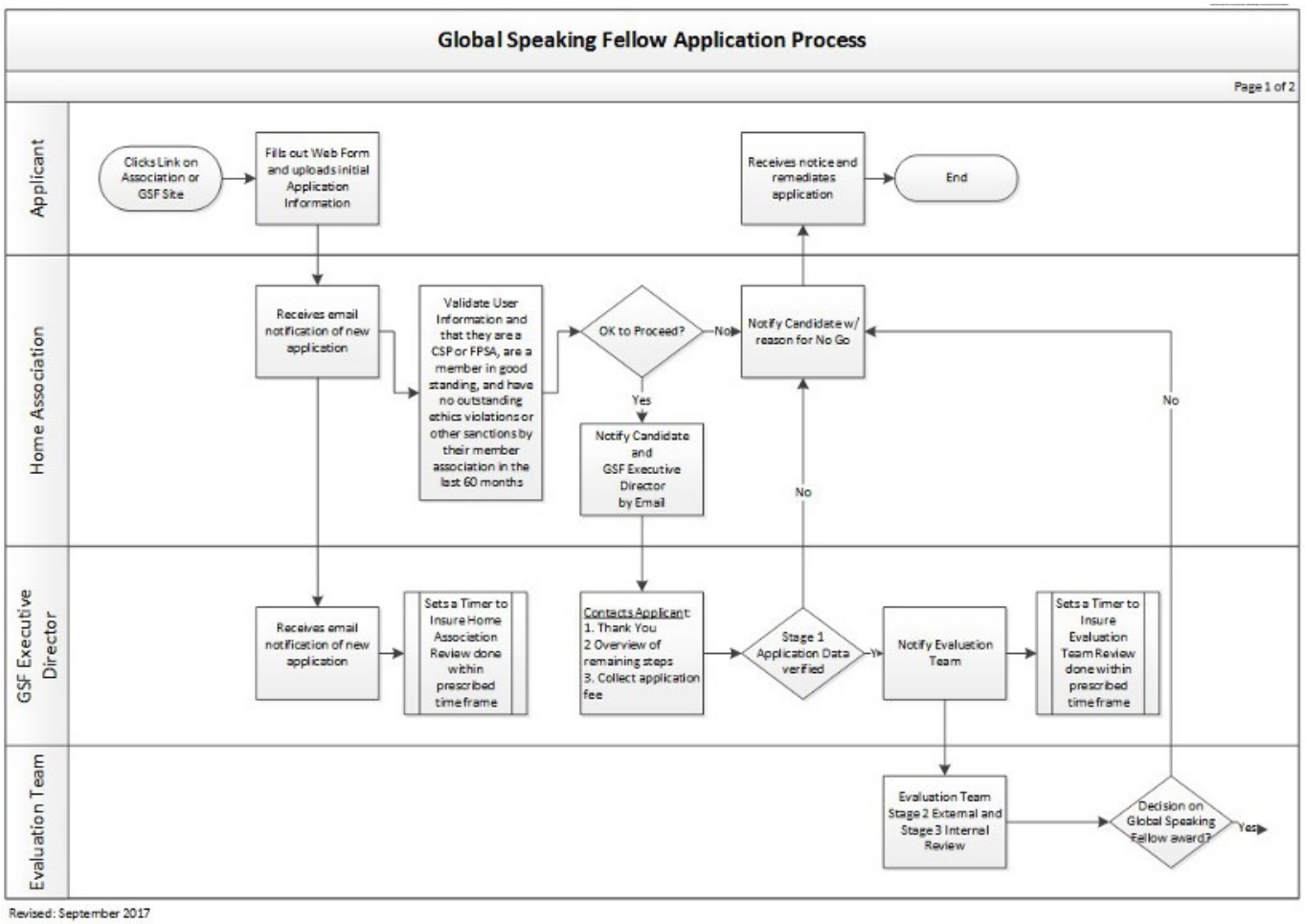
An external review by clients and an internal reviews by peers will supplement the application data submitted by applicants. Within the review and assessment components of the process, the team of volunteer peers will help determine global-level competence. These reviews are an important part of the credibility of the designation in the eyes of the clients hiring global speakers. Every effort is made to standardize these reviews and the system will allow for appeals to make sure the process minimizes bias.

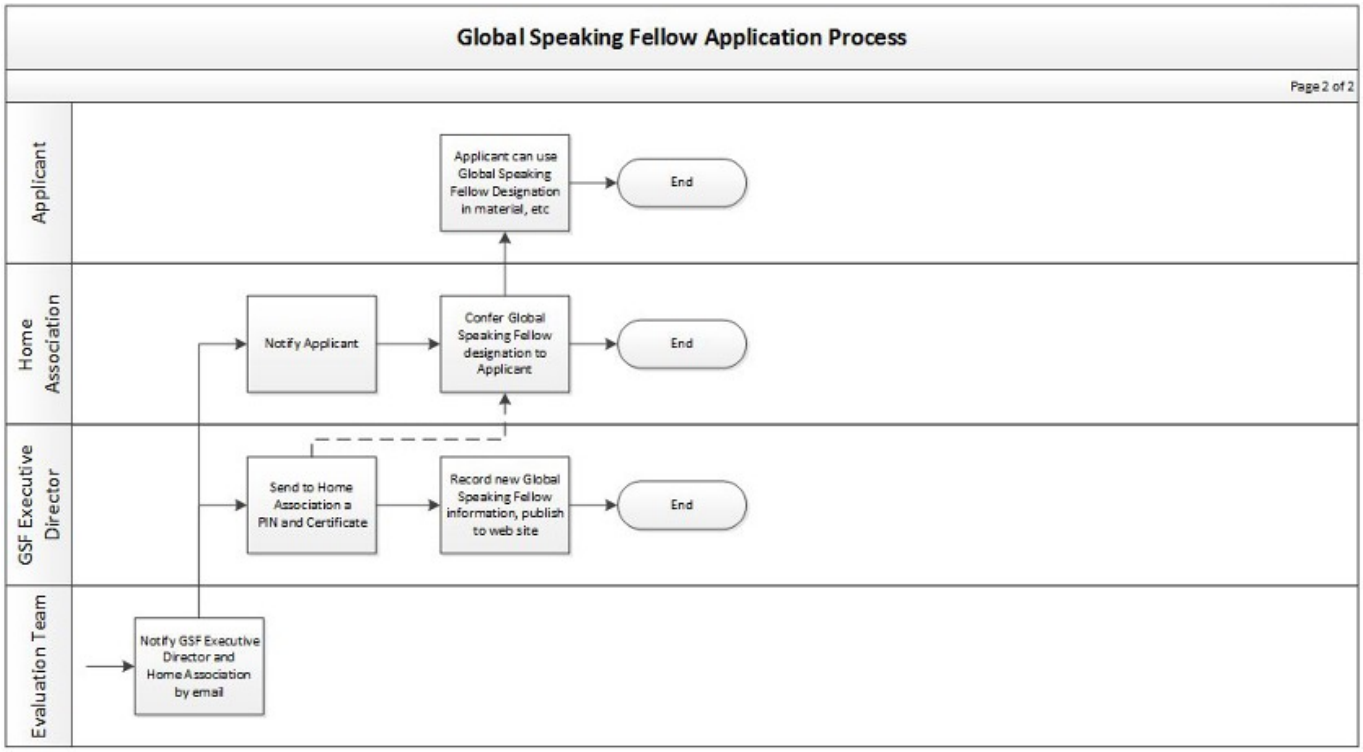
APPENDIX D - GEOGRAPHICAL GROUPS AND COMPOSITION AS PUBLISHED BY THE UNITED NATIONS STATISTICS DIVISION

Please refer to this United Nations page, Geographic Regions tab for the world regions and country groupings.

https://unstats.un.org/unsd/methodology/m49/#geo-regions

APPENDIX E – GLOBAL SPEAKING FELLOW APPLICATION PROCESS





Revised: September 2017

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8. Charities and Donations

8.1 Charities and Causes

The GSF Board of Directors may, at their discretion, select and promote a charity or cause provided the charity or cause meets the following criteria:

- does not have any political or religious agendas
- serves an identifiable and worthy purpose
- is administered by a not-for-profit agency
- does not directly benefit any GSF Board of Directors member

See Addendum F for the Charitable Gift/Donation Policy and Guidelines

8.2 Bereavement Policy

- On the death of a spouse, partner or child of a current member of the GSF Board or of a Past President of the GSF, a token of condolences in the form of flowers or any other appropriate gesture will be made to the member, to an upper limit of $100 USD.
- On the death of a member of the Board or a Past President of the GSF, a similar gesture will be made to their family to the value not exceeding $100 USD.

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9. Events and Summits

9.1 Scheduling Events and Global Speakers Summits

The GSF will not host or schedule events in a local member association's nation that competes with their local member association's meetings. GSF may partner with member associations to bring summits and events to their local market. As a courtesy to a Global Speakers Summit (GSS), member associations will not schedule their annual event within a month on either side of a GSS.

The business model for the Global Speakers summit was presented to the previous GSF Executive Council and signed off in January 16, 2017 and provided here as Addendum A.

9.2 International / Global Speakers events at Member Association's Conventions

The GSF may assist as requested in presenting an event for global speaking education, networking and connectivity during a member association convention.

9.3 Awards Presentations

The International Ambassador Award, the Beverly Babb award and any other GSF designated award(s) will be presented in conjunction with a members association annual convention or international event designated by the GSF Board of Directors pursuant to scheduling main-stage time, when possible, with the member association.

New Global Speaking Fellows should be recognized when possible at their own association's annual convention and/or at an annual gathering of the GSF member associations.

9.4 Professional Speakers Celebration Day

March 14th Be Named Professional Speakers Celebration Day annually, beginning in 2023

Attempts for an annual event in the past have often resulted in lackluster enthusiasm, partly because speaking Associations and their members couldn't remember what day they were to celebrate and what would they be celebrating.

To address these concerns, March 14th will hereby be named as Professional Speakers Celebration Day because March 14th is also known as "pi" day (i.e., 3.14).

The use of the word "pi" would tie, in a homophonic manner (i.e., a homophone is a word that sounds the same as another word but has a different meaning and/or spelling), into the motto of Cavett Robert (co-founder of the National Speakers Association) when he said (about the profession of speaking and speakers), "Don't worry about how we divide up the pie, there is enough for everybody.

Let's just make a bigger pie!" These words are as true today as then for all professional speakers, locally and globally.

Each Association could decide how they might want to celebrate the profession of speaking and its members in whatever manner they want (e.g., recognizing certain members, postings on social media, providing statistics about the impact of speakers).

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10. Standing Committees and Task Forces

10.1 Purpose

Committees and task forces must be given clear purposes, deadlines and, as appropriate, ending dates prior to appointment of members.

10.2 Presidential Leadership Team

The Presidential Leadership Team consists of the GSF President, President-Elect, Vice President, Immediate Past President, and Executive Director. The Presidential Leadership Team serves as the interim governing body between meetings of the GSF Board of Directors. Members of the Presidential Leadership Team do not represent their association or country, and are considered an unaffiliated leader of the global organization during their term of service. Members of the Presidential Leadership Team must be members in good standing of a member speaking association for the duration of their term.

The Presidential Leadership Team may vote to change policy after notifying the GSF Board of Directors that a policy change is under consideration. Financial decisions that result in expenses of over $5,000 USD may be made by the Presidential Leadership Team after notifying the Board of Directors that a decision that would impact the expense budget at over $5,000 USD is under consideration. Budget decisions resulting in less than $5,000 USD do not need notification.

The result of policy and financial decisions will be distributed to the GSF Board of Directors. Bylaw changes reside under the authority of the GSF Board of Directors.

10.3 Other Committees (need to provide any detailed policies and procedures)

1. Steering Committee
2. Nominating Committee
3. Finance Committee
4. Strategic Planning Committee
5. Marketing and Communication
6. New Association Development
7. Association Executive Directors
8. Global Designation
9. Professional Speakers Celebration Day

10.4 Committee Chair Term Limits

The term of each Committee Chair for those committees in 10.3 above and any ad hoc committees or task forces established by the GSF President shall be one (1) year, and coincide with the term of office

of the GSF leadership team. The term limits of each Committee Chair will be three (3) consecutive terms at which time a Committee Chair must take at least one (1) term off as Chair of that committee. If there is no one who is available or willing to Chair a committee whose existing Chair has reached their term limit, the term limit may be extended by one (1) year upon approval of the Board of Directors.

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11. Website and Communications

11.1 Website

The GSF will maintain a website as a communication vehicle to all member associations, the media and the public at large. (globalspeakersfederation.net)

11.2 Social Media

The GSF operates under the brand “Voice of GSF” across all its active social media platforms. Official GSF social media accounts are maintained on the following platforms:

- Facebook
- LinkedIn
- Instagram
- YouTube

All other social media accounts have been closed or parked to direct traffic to the active platforms and ensure a centralized, consistent, and more impactful social media presence for the GSF.

A central email address (voiceofgsf@globalspeakers.net) is used for all online activities related to GSF social media.

The GSF maintains a consistent messaging strategy across all platforms, focusing on serving member associations, sharing industry insights, and building a global community.

The GSF staff and a designated GSF volunteer are responsible for managing all social media accounts, adhering to GSF communication standards and guidelines and ensuring unified administration and communication.

Social media posts are pre-scheduled and managed via a central social media management tool to ensure consistency and efficiency in content delivery.

All regular posts are subject to approval by GSF staff to maintain consistency and quality. Ad hoc posts outside the regular content schedule require approval from the GSF President or GSF staff before publication.

The GSF uses social media analytics to monitor engagement and continuously improve the effectiveness of its social media activities.

11.3 Email Newsletter

The GSF utilizes an email newsletter as another method of communication with subscribers. This approach ensures direct, timely, and targeted information sharing.

All official GSF email communication is sent from the central email address:

voiceofgsf@globalspeakers.net via an email marketing platform.

The GSF staff and a designated GSF volunteer are responsible for managing all email communication. Email newsletter content is aligned with GSF's overall communication strategy, ensuring consistency across all platforms.

The frequency of email communications is regular, yet flexible and responsive, adapting to the federation’s needs, calendar of events, and relevant industry developments.

Ad hoc emails outside the regular communication schedule require approval from the GSF President before distribution.

The GSF subscriber database comprises association leaders, who are regularly encouraged to sign up for the newsletter, as well as any individuals interested in GSF activities who can subscribe via the GSF website. The GSF maintains the email database in compliance with relevant data protection regulations. All email communications adhere to anti-spam laws and provide clear options for recipients to manage their subscription preferences or unsubscribe.

The GSF uses email analytics to monitor engagement and continuously improve the effectiveness of its email communications.

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12. Finance and Dues

12.1 Dues

The annual dues for GSF full member associations shall be set by the GSF Board of Directors at a per-member rate, in US dollars, and shall cover benefits and services negotiated on behalf of all member associations. Current benefits and services will be posted on the benefits page of the GSF website.

The annual dues for GSF affiliate members shall be set by the GSF Board of Directors at a fixed rate in US dollars.

12.2 Current Dues

In 2024, GSF implemented a dues structure fitting for a global entity based on the economic situation of the country/regions each association is in. It is composed of a system of 5 tiers which is relatively easy to administrate and creates a more just system as follows based on the GDP as published by the World Bank:

Word Bank Tier	**Discount on Dues Rate**
TIER 5 GDP USD 40,001+	No discount on dues rate
TIER 4 GDP USD 30,001-40,000K	Discount of 20% on current dues rate
TIER 3 GDP USD 20,001-30,000	Discount of 40% on current dues rate
TIER 2 GDP USD 10,001-20,000	Discount of 60% on current dues rate
TIER 1 GDP USD 0-10,000	Discount of 80% on current dues rate

The GDP tier for each association is to be evaluated every three years by the PLT and associations will be informed by the CEO of the tier they are billed on from the next year forward.

The minimum dues payment from any GSF member association is the minimum 40 members times their tiered dues rate.

Dues are set at $16 USD annually per member of each GSF full member association beginning January 1, 2025. In 2013 the dues structure was adjusted recognizing reduced fees for those associations with membership over 1,000 members and is shown below:

Members	**Annual Fee Per Member**
40 – 999	$16.00 (no change)
1,000 – 1,499	$15.00
1,500 – 1,999	$14.00
2,000 – 2,499	$13.00
2,500 - 2,999	$12.00
Over 3,000	Flat fee of $30,000

Annual dues for affiliate members are set at $995 USD.

12.3 Payments

Dues are payable by the member to the GSF through a secure online credit card payment process or other agreed system. GSF will not collect dues from individual members of member associations and all dues payments are the responsibility of the member association.

Dues payments may be collected in either annual or quarterly payments. By January 15th of each year, member associations are to provide their current member count to the Executive Director and select their preferred invoicing option for the year:

1. Pay in full via one invoice (dated January 31st) of each year.
2. Pay in 4 installments invoiced once per quarter (Jan 31, April 30, July 31, Oct 31).

Member associations are to provide quarterly membership counts to the Executive Director so that the GSF can ensure records are up to date and have the information for data and statistical purposes.

12.4 Fiscal Year

The fiscal year of the GSF shall begin January 1st and end December 31st. The presidential travel year is the period between the close of the GSF Annual Meeting of their appointment and the following GSF annual meeting.

12.5 Annual Statements

Annual reconciled financial statements are due to the Presidential Leadership Team by March 1 and presented at the GSF annual meeting for approval by the GSF Board of Directors.

12.6 Credit Card

The GSF may hold a credit card to be used solely for GSF-related purchases with a starting credit limit of USD $12,000. No balances will be carried on the card and the GSF Executive Director is the authorized user of the card. [July 2008]

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13. Reciprocal Agreements

13.1 Reciprocal Meeting Registration Rates

GSF member associations agree to provide member rates at their events and educational programs to members in good standing of other GSF member associations.

13.2 Reciprocal Presidential Registration Rates

GSF member associations agree to provide a complimentary meeting registration for all current member association presidents and complimentary meeting registration for the current GSF President. Member associations, when possible, may provide complimentary, or cost-recovery, registration rates for Past GSF Presidents. Any other arrangements are at the sole discretion of the member associations.

13.3 Presidential Meeting Attendance

Presidential attendance at any GSF member association event in no way implies a position on a member association's meeting program, except for a GSF Welcome/Update message.

Please see section 4.3.1 for other association obligations for Presidential Meeting Attendance.

13.4 GSF Dual Membership

All GSF member associations will offer a dual membership category. This category allows active members in good standing of their home association to join another GSF association at a reduced fee, typically 50% of the regular membership rate.

1. Primary Membership: It is incumbent upon an association to ensure all applicants have been informed of the GSF member associations and the territories they cover. The association tracks that it has encouraged all applicants to join their home association.
2. Implementation Confirmation: It is incumbent upon member associations to confirm the following details during annual GSF membership dues reporting:
    - the total number of association members,
    - the total number of primary memberships by country,
    - the total number of dual memberships by country,
3. Home Association: the home association is defined as the association that operates in the territory of the address provided by the applicant.

13.5 GSF Members Presenting at Other Association Events

Based on a long-standing reciprocity agreement and in alignment with the generosity of spirit of the GSF and its member associations, no GSF member association member shall be entitled to receive compensation to speak at another GSF convention, including fees, travel, accommodation, etc. Any compensation is at the discretion of the member associations.

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14. Contracts

All contracts that imply financial obligations are the business of individual parties. GSF may make recommendations on benefits and services but is not authorized to enter into contracts on behalf of individual speakers associations.

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15. Benefits and Services

15.1 Benefits of Membership for GSF Member Associations

1. Raise your association’s profile by being part of an expanding global community of member associations.
2. Help to enhance the worldwide recognition of the professional speaking industry.
3. Learn and gain support from other member associations.
4. Provide international leadership development for association leaders.
5. Gain access to a global library of valuable resources, templates and guidelines from member associations worldwide.
6. Share best practices, procedures, information and resources between associations.
7. Collaborate with other associations or chapters to gain support and exchange ideas.
8. Develop opportunities with external organizations within the meetings industry and speakers bureaus.

15.2 Benefits for Individual Members of GSF Associations

1. Enhance your credibility by membership of a recognized association that is part of a respected global community.
2. Attend member associations’ regular meetings and annual conventions at special members’ rates.
3. Learn from some of the best speakers in the world.
4. Keep up-to-date about the latest technology and tools in our industry.
5. Access educational opportunities to improve and advance your speaking career.
6. Establish a network of international friends and connections with like-minded professionals.
7. Earn a globally-recognized designation.
8. Access valuable support and advice from the international community via social media.
9. Learn about the variances in speaking in different global markets as well as travel and cultural specifics.
10. Expand your speaking career globally.
11. Create global business alliances and partnerships.
12. Develop your leadership skills by getting involved in association or Federation leadership.

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16. Board of Directors - Code of Conduct and Core Values

As Board members of the Global Speakers Federation and as representatives of our respective member Associations, we commit to each other that we will act in an honest manner with one another and that we will make decisions that are in the best interest of the members of the Global Speakers Federation. At the beginning of each Board meeting, Board members voice these values. These are the core values that we use in the conduct of our meetings:

16.1 Respect

We will treat everyone with dignity and respect, by being open to one another and by valuing one another. We accomplish this through:

1. Honoring each other by being on time, by being prepared, and by being present throughout the entire meeting.
2. Speaking only when we have something new to add to the discussion and by refraining from side bar conversations.
3. Listening respectfully to other Board member’s opinions, thoughts, and feelings, even if we disagree, both verbally and non-verbally.

16.2 Integrity

We will embrace and practice a high standard of personal ethics. We demonstrate this through:

1. Maintaining confidentiality on all Board matters.
2. Standing behind the decisions of the Board no matter what our personal opinions might be.
3. Honoring the ideals and principles of our Founders and the Board members who have served before us.

16.3 Communication

We will create an environment that allows for and encourages an open and honest exchange of ideas, thoughts, and feelings. We accomplish this through:

1. Listening actively, openly, and objectively.
2. Voicing our opinion in the meeting rather than later.
3. Using the Rules of Order that have been developed for the Global Speakers Federation.

16.4 Accountability

We will be accountable to our member Associations and use the power and responsibility entrusted to

us in a wise manner. We demonstrate this through:

1. Making decisions that are supported by data and input from key stakeholders.
2. Staying strategic in our Board discussions.
3. Being fiscally responsible.

16.5 Courage

We will accept necessary strategic changes and act on them, even when change is uncomfortable or unpopular. We accomplish this through:

1. Focusing on what is right, not on who is right.
2. Learning from the past, but not being tied to it.
3. Caring enough to confront issues and ideas early and directly.

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17. Mission and Vision Statements

17.1 Mission

To be the catalyst and central hub for the global professional speaking industry. The core purpose is to elevate, empower, and transform the profession, leading to lasting global impact.

17.2 Vision

GSF is envisioned as the driving force for connection, innovation, and positive change within the speaking profession. Its mission should be “transformative, purpose-driven,” with a global impact that goes beyond mere financial success.

17.3 Directional Statement

The Global Speakers Federation (GSF) is dedicated to empowering professional speaker associations and their members worldwide by serving as a dynamic hub for collaboration, resources, and best practices, while boldly defining and upholding rigorous professional standards to elevate voices, foster sustainable growth, and drive transformative impact on global audiences.

17.4 Strategic Pillars

17.4.1 Governance

This section focuses on strengthening the internal structures, policies, and leadership of the GSF to ensure effective decision-making, transparency, and sustainability, including positioning GSF as the standards and potential (to be discussed further) certification body for the global speaking industry, with enhanced board structure, engagement, and succession practices to drive accountability and long-term health, incorporating a reimagined board for agility, policy reviews using AI, unified board requirements, easier sharing mechanisms, peer-to peer reviews, and support for member associations' policies.

17.4.2 Partnerships

This section outlines strategies to build and maintain strategic alliances that expand GSF's reach, resources, and impact in the speaking industry, including support for certification frameworks, collaborative professional development, improved communication, and branding efforts to enhance visibility, credibility, and engagement, focusing on internal and external global partners, KPIs for success measurement, and targeted organizations like IMEX, LinkedIn, platform providers, and TEDx.

17.4.3 Advancement

This section addresses efforts to grow resources, membership, and visibility to support GSF's long-term goals and financial health, emphasizing global recognition, advocacy, and positioning GSF as an enabler of excellence in the speaking profession, with a focus on thought leadership and organizational culture to drive standards, professionalism, and engagement, including brand story development, learning libraries, knowledge sharing, AI utilization, aspirational offers, and fiscal soundness.

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18. GSF Code of Ethics

GSF Board Members and Volunteers adhere to a set of ethical standards in their behaviour and engagement with each other and the Board of the GSF.

1. Core Principles Guiding Our Actions
    - Respect for Diversity: We honor cultural differences and ethical norms across our member associations, ensuring inclusivity in all interactions.
    - Integrity: We act with honesty and openness in all dealings with GSF and its members, reflecting the Federation's values of trust and fairness.
2. Professional Conduct Expectations
    - Conflict of Interest: Board Members and Volunteers must disclose any personal interests that might conflict with their GSF duties and avoid such situations.
    - Confidentiality: We protect sensitive information about member associations, individuals, and GSF operations to maintain trust.
3. Responsibilities to the Federation
    - Compliance with Laws and Bylaws: We follow all local, national, and international laws relevant to GSF's work, as well as the bylaws and policies of our home associations.
    - Transparency in Leadership: We communicate openly about decisions impacting GSF and its members, ensuring clarity and accountability.
    - Inclusivity in Decision-Making: We create an inclusive environment, valuing diverse perspectives in all governance decisions.

18.1 Responses to Ethics Violations

18.1.1 Training and Education

Purpose: To provide insight into the issues concerned for Board Members and Volunteers.

Initial Action:

- Provide adequate onboarding training for existing and new Board Members and Volunteers.
- Provide tailored ethics training or workshops specific to any specific breach of the GSF Code of Ethics.
- Emphasise the standards and principles of GSF's Code of Ethics and to bring it to the attention of Board Members and Volunteers at each Board meeting and AGM.

Implementation:

- Promote and share GSF's Code of Ethics to Board Members and Volunteers when this is adopted and add it to the onboarding programme.
- Emphasise the standards and principles of GSF's Code of Ethics and to bring it to the attention of Board Members and Volunteers at each Board meeting and AGM.
- Discuss it in the Leader 2 Leader calls, post the Code of Ethics to the website and social media channels.

Goal:

- Equip Board Members and Volunteers with the knowledge to avoid potential breaches and strengthen overall ethical awareness.

18.1.2 Leadership Intervention

Purpose: To mediate and resolve any ethical issue while reinforcing GSF's ethical culture.

Initial Action:

- Attempt to defuse the situation with transparent dialogue with the Board Members, Volunteers or leadership of the members association to understand the root cause and address the concern.
- If necessary, assign a member of the PLT or create an ethics committee to assess the situation.

Steps to Consider:

- Issue a formal warning to the Board Members or Volunteers or to the members association itself, where appropriate, if the breach is minor and unintentional.
- Develop a corrective action plan that might include apologies, restitution, or public acknowledgment if appropriate.

Goal:

- Demonstrate accountability and align actions with GSF ethical principles without immediately resorting to punitive measures.

18.1.3 Suspension or Other Disciplinary Actions

Purpose: To address severe, intentional, or repeated violations where other measures fail.

Application:

- Where necessary when other measures have failed, the Board of GSF may consider suspension of a Board Member, Volunteers or a member association.
- The process will include:
    1. A preliminary investigation by an ethics review committee nominated by the President of GSF
    2. Notification of findings to all relevant parties.
    3. Temporary suspension from specific roles, voting rights, or federation activities while undergoing further investigation for the Board Member, Volunteer or a member association.

Possible Extensions:

- For individuals: Sanctions, such as removal from board position or volunteer role.
- For associations: Sanctions, such as removal from federation membership.

Goal:

- Protect the integrity of the GSF and provide a deterrent against ethical breaches.

18.2 Why a Code of Ethics

18.2.1 Establishes Standards of Conduct

A Code of Ethics provides clear guidelines for acceptable behavior and professional standards. It helps members understand what is expected of them in terms of integrity, respect, and professionalism.

18.2.2 Builds Trust and Credibility

Having a formal Code of Ethics enhances the Federation's reputation. It assures stakeholders, clients, and members that the organization prioritizes ethical behavior and accountability.

18.2.3 Protects Members and the Federation

A Code of Ethics can act as a safeguard against misconduct. It provides a framework for addressing disputes or grievances, ensuring fairness and consistency in resolving ethical concerns.

18.2.4 Promotes Unity and Shared Values

In a global organization a Code of Ethics can unify members from diverse backgrounds by establishing a shared set of principles that transcend cultural differences.

18.2.5 Guides Decision-Making

When faced with challenging situations, members can refer to the Code of Ethics to make informed and morally sound decisions.

18.3 Ethics Guidelines

The proposed Ethics guidelines are stated under the categories of:

- Core Ethical Principles
- Professional Conduct
- Member Responsibilities
- Governance and Leadership

18.4 Responses to Ethical Violations

There are 3 levels of response:

- Education
- Intervention
- Suspension

There are two subjects of responses, one for associations violating the guidelines and the other for an individual violating the guidelines.

18.5 Benefits to GSF association members

Increased assurance of the integrity of the actions of GSF as well as the Board Members and Volunteers, to enhance the reputation and value of their membership of GSF.

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19. GSF Sexual Harassment Policy

As Board members of the Global Speakers Federation and as representatives of our respective member Associations, we commit to each other that we will act in an honest manner with one another and that we will make decisions that are in the best interest of the members of the Global Speakers Federation. At the beginning of each Board meeting, Board members voice these values. These are the core values that we use in the conduct of our meetings:

19.1 Honoring Personal Agency

This policy recognizes the agency of all parties involved. The complainant has the right to choose whether to pursue a complaint, to select the preferred process for resolution, and to withdraw from the process at any time.

The respondent is entitled to a fair opportunity to respond to the allegations. Both parties are encouraged to participate actively in the process.

19.2 Terminology

Term	When to Use	Rationale
Complainant	During investigation	Neutral, respects agency
Victim	After findings, impact	Recognizes harm, post-investigation

19.3 Scope & Applicability

1. This policy applies to complaints that are directly received by the Global Speakers Federation (GSF).
2. This policy also guides associations affiliated with or related to GSF on the steps to take when they face any sexual harassment issues internally.
3. If an association facing a sexual harassment issue approaches the Global Speakers Federation (GSF) for support, GSF may offer guidance, resources, and assistance to help address the matter in a manner consistent with the established policy.

In summary, the policy's scope covers both direct complaints to GSF and the responsibility of associations to manage sexual harassment issues, with GSF playing an advisory capacity aimed at fostering consistent integrity and safety practices across affiliated associations.

This policy would apply to all members, employees, volunteers, guests, and participants in all organizational activities, including meetings, events, and online interactions, irrespective of their gender.

19.4 Definitions

19.4.1 Sexual Harassment:

Unwelcome or unwanted conduct of a sexual nature (verbal, visual, or physical) that is likely to cause offence, humiliation, or create an intimidating, hostile, or detrimental environment. It includes, but is not limited to:

- Unwanted sexual advances or requests for sexual favors
- Uninvited touching, hugging, kissing, or other physical contact
- Repeated sexual jokes, flirtations, or propositions
- Comments or jokes about an individual’s body or sex life
- Display or distribution of sexually suggestive materials
- Verbal abuse of a sexual nature
- Leering, whistling, or suggestive gestures
- Spreading rumors about a person’s sex life or sexual orientation
- Use of sexually suggestive language

19.4.2 Retaliation:

Any adverse action taken against an individual for reporting sexual harassment or participating in an investigation, including intimidation, threats, or exclusion

19.4.3 Responsibilities

Role	Responsibilities
Board/Leadership	Promote adherence to the policy, encourage awareness activities, facilitate the complaint process, and strive to foster a respectful environment
Ethics Committee	Receive and investigate complaints, ensure confidentiality, recommend corrective actions
All Members/Staff	Follow the policy, consider reporting incidents, aim to cooperate with investigations, and engage in awareness activities

19.5 Reporting and Complaint Procedures

How to Report:

- Reports will be accepted only in writing, addressed either to the Executive Director, Association President, or Designated Officer
- Complaints should include details of the incident(s), dates, locations, and any witnesses
- Reports should be made as soon as possible, ideally within one year of the last incident, unless circumstances prevent this

Confidentiality: All reports and investigations will be handled with the utmost confidentiality, disclosing information only as necessary for investigation or corrective action

Investigation Process:

- The Ethics Committee will inform the respondent within 10 business days of the complaint, including the nature of the allegations and the right to respond

- Both parties may submit written statements and evidence
- The Committee will conduct interviews and gather relevant documentation
- Investigations will be completed within 90 business days, with extensions communicated as needed
- If legal or external investigations are ongoing, the internal process may continue in parallel

Resolution and Corrective Actions

- Early resolution through mediation may be offered if both parties consent
- Action will be taken if proven malicious, including warnings, suspension, or expulsion
- Both parties will be informed of the outcome and any actions taken

19.6 Protection from Retaliation

No individual will face retaliation for making a good-faith complaint or participating in an investigation. Retaliation will result in disciplinary action

19.7 Awareness and Communication

- The policy will be communicated to all stakeholders and posted in accessible locations.
- Regular awareness sessions will be provided to ensure understanding and compliance.

19.8 Review and Monitoring

- The policy will be reviewed every three years or as required by changes in law or organizational needs
- Feedback from members and staff will be incorporated into policy updates

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https://wiki.globalspeakersfederation.net/doku.php?id=sexual_harassment

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20. WhatsApp Groups and other Social Media Message Boards Policy

Global Speakers Federation (GSF) Policy on the Creation and Management of WhatsApp and Social Media Message Boards

20.1 Purpose

The purpose of this policy is to ensure consistent, secure, and appropriate use of messaging platforms and social media message boards representing or associated with the Global Speakers Federation (GSF). This policy protects the organization’s reputation, ensures alignment with GSF’s mission and governance, and prevents unauthorized or misleading communications.

20.2 Scope

This policy applies to all GSF officers, board members, committee members, chapter leaders, staff, contractors, volunteers, and members acting in any capacity on behalf of, or in association with, the Global Speakers Federation.

This policy covers, but is not limited to:

- WhatsApp groups
- Telegram, Signal, Slack, Discord, or similar messaging platforms
- Private or public social media groups (e.g., Facebook, LinkedIn, Instagram, or comparable platforms)
- Any digital message board or group chat that references, implies, or represents GSF

20.3 Authorization Requirement

The creation of any WhatsApp group, social media group, or digital message board that:

- Uses the name “Global Speakers Federation” or “GSF”
- References GSF activities, events, leadership, or committees
- Is intended for GSF members, partners, or stakeholders
- Could reasonably be perceived as an official or affiliated GSF communication channel

must receive explicit, prior written authorization from GSF leadership.

Authorized leadership includes:

- A member of the GSF Presidential Leadership Team plus approval of the GSF Executive Director, or
- A designated representative expressly authorized by the Board

20.4 Prohibited Actions

Without explicit authorization, individuals may not:

- Create or administer messaging groups or social media boards representing GSF
- Use GSF branding, logos, or naming conventions in group titles or descriptions
- Present unofficial groups as endorsed, official, or sanctioned by GSF
- Add members to such groups without their consent and without authorization

Unauthorized groups may be required to be renamed, transferred, or permanently closed at the direction of GSF leadership.

20.5 Approval Process

Requests to create a messaging or social media group must include:

- Purpose and intended audience of the group
- Platform to be used
- Proposed administrators/moderators
- Duration (temporary or ongoing)
- How the group supports GSF’s mission and objectives

All requests must be submitted in writing to GSF leadership and approved before the group is created.

20.6 Governance and Moderation

All authorized groups must:

- Have the GSF-office added as an administrator
- Adhere to GSF’s Code of Conduct and communications standards
- Be moderated to ensure respectful, inclusive, and professional dialogue
- Avoid political, commercial, or personal promotion unless expressly permitted

GSF leadership reserves the right to review, monitor, or revoke authorization at any time.

20.7 Disclaimer for Personal Groups

Members are free to create personal or informal groups only if:

- The group does not use the GSF name, branding, or imply affiliation
- It clearly states that it is not affiliated with or endorsed by GSF

20.8 Enforcement

Violations of this policy may result in:

- Immediate removal or closure of unauthorized groups
- Removal of administrative privileges
- Disciplinary action in accordance with GSF governance and ethics policies

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21. GSF Presidents Leadership Travel Policy

This policy will establish a consistent and transparent policy that defines eligible leadership travel expenses for the GSF President or approved designate when conducting authorized GSF business. The policy provides clarity for current and future leadership while supporting responsible stewardship of GSF funds.

Each year an amount is approved for Leadership travel in the annual budget. However, our current policy does not specifically state what specific expenses can be claimed under this category. Some expenses for Presidential travel are covered by the host association as per Policy #4.3 - Attendance of the GSF President at Member Association Conventions. To avoid any GSF representative being out of pocket, this policy seeks to clarify what can be claimed back, over and above airline travel.

Admissable expenses to be claimed, using actual expense incurred, are:

- Round trip airfare (economy)
- Taxi/uber or similar transportation to/from home to local airport, or parking fees at the airport (based on the number of days of the event attending)
- Taxi/uber or similar transportation to/from arrival airport to local hotel
- If accommodation is not in the same venue as the event, then transportation to/from hotel to venue is
- covered
- Accomodation not covered by the host association (relating only to the event and not extended stays)
- Meals on travel days, limited to $75 USD per day
- Meals during the event days not covered as part of Conference/Event registration, limited to $75 USD per day
- Cost of travel visas, documents or country entry fees

If an extraordinary or unusual expense not listed above is required, the process for approval would be a prior review and formal approval by the PLT. Unanticipated or emergency expenses incurred during travel would similarly require review and formal approval by the PLT.

All expense claims must be submitted using the GSF Expense Requisition form along with scanned copies of all supporting receipts. Currency conversions will use the exchange rate reflected on the payment method or, if unavailable, the published exchange rate on the transaction date.

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Addendum A.1 – Global Speakers Summit Business Model

Submitted By: Elias Kanaris Title: Vice President, GSF

Approved: January 13, 2016

Motion Approved: To accept the document titled GSS Business Model (FINAL-Nov2016) as the recommended business model for the host nation to use for future GSS events.
Objective/purpose of proposal. What will it accomplish? What GSF goal or strategic objective is addressed?
To provide consistency in the way that the Global Speakers Summit is organized and to gain the maximum support from GSF associations, while delivering a positive revenue stream for the GSF. At the 2016 Executive Council meeting held in July, it was approved to move forward with the 2018 GSS upon the approval of a proposal on how the GSS and future GSS's would be structured.
Background, history, research and references:
FINAL GSS Report (compiled by Kristin Arnold, CSP) delivered in July 2015 (supporting document to this proposal); two committee meetings were held in addition to several one one-on-one consultations
Benefits to GSF association members:
If implemented effectively, future GSS events can become a revenue generation tool for the host association and the GSF.
In addition, this event should be the hub for leadership teams to congregate every two years to share best practices.
Additional benefits of implementing this business model will lead to the following:
- Empower speakers who work globally (as well as those who aspire to break into global markets) and represent a critical segment of associations membership by creating connection opportunities while inspiring and educating speakers.
- Create awareness of the value of professional speakers in the host country and other local/regional markets without competing with GSF member associations.
- Provide a positive revenue opportunity for the GSF and the host association. If possible to also provide a revenue opportunity for regional associations and potential partnering organizations, while contributing to a worthwhile cause identified by the host nation and approved by the GSF.
- Engage the meetings industry and economic buyers by bringing international thought leaders to the region to create positive connections for future business opportunities with the meetings (MICE), hospitality and business communities.
- For GSF member associations an opportunity to participate in roundtables and sessions for association leaders, with the objective of sharing best practices (marketing, membership, ethics, governance, alliances, sponsorship, programming, convention, meeting attendance - to name a few); empowering the network, and nurturing collaboration beyond the usual virtual channels.
Potential concerns of this proposal:
All GSF member associations will embrace the GSS, as is currently noted in the GSF Policy and Procedures document and ensure that there are no competing association events within a reasonable time period before and after the GSS (policy #7.1 – Scheduling Events and Global Speakers Summits)
Implementation, including funding needed and general time table:
An RFP for meeting space has gone out and proposals have been received for February 2018 – upon acceptance of this proposal the planning team will move forward to secure venue, form the GSS team, etc.

Motion Approved: To accept the document titled GSS Business Model (FINAL-Nov2016) as the recommended business model for the host nation to use for future GSS events.
Projected income and expenses expected to impact future budgets:
Upwards of US$30,000 of revenue to help the GSF to fund future activities and reduce the dependence of funding from the member associations

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Addendum A.2 – Recommendations for Future Global Speakers Summit

Recommendations for future Global Speakers Summit by Sid Ridgley, CSP, GSS 2013 Chair

The GSS Strategy and Governance Project

A critical step for ensuring success of the Global Speakers Summit is to make sure that the Global Speakers Summit Executive Committee (comprising the GSS Chair, GSF and local association Presidents and President-Elects, plus the GSF Executive Director) and staff are all supporting the key strategies and goals. Speedy decision-making is also vital.

Budgeting and Financial Control

Review and re-state the GSS budget/financial plan 6-9 months after an association is awarded the hosting responsibilities of a Summit.

Project Planning

Given that the GSS is over 2+ years in the planning and execution processes, it is imperative that a project plan with defined activities should be in place.

Opinions vs Accountability

The GSF and local association Presidents and President-Elects must continue to support the decisions of the GSS Chair.

The GSS Audience: Who Is Being Served?

If the primary audience is the true global speaker then run it as an intimate Summit, much like a think tank and strategic planning session – not as a convention. If the primary audience is both local and global, then the GSS Vancouver program is a good starting guide.

Global Speakers Network Session

- Provide GSN members with a nominal discount or 1 free pick to a pre-convention workshop if providing GSN members more value is a true requirement.
- Assuming that the GSS is the GSN session, then consider including a one-year membership in

the GSS fee. That is, attending a GSS (full registration) also gives you 1-year membership in the GSN. While it may not generate income because the membership was given away, it will in subsequent renewal years. Existing GSN members would get a nominal discount or 1 free pick to a pre-convention workshop.

Extensive Marketing

Marketing and communications requires strategy and planning, plus the resources to support it. Any GSS is an opportunity to market the association to local businesses, local prospective members, etc.

Website: A Critical Success Factor

The GSS 2013 website (www.gss2013.com) was critical in its success. We must capitalize on what was learned and continue to push the technology further. It is imperative that a future GSS has its website up and running immediately upon announcement.

Running the Global Speakers Summit 2018 by Mike Handcock, CSP, Global Speaking Fellow

Between February 23 - 26 2018, the Global Speakers Summit (GSS2018) was run in Auckland New Zealand. It included 72 speakers on stage over 4 days and 185 participants from 25 different countries. On Day one another 65 local CEO’s and senior corporates joined us for Corporate Day.

The overall event ran at a profit for the first time in a number of years.

The purpose of this report is not to ramble in detail but simply to point out what did and did not work and why, so future organisers of this or any other conference may learn from this event.

Over 2/3rd’s of the attendees rated this convention as excellent in the feedback system that followed.

Why the GSS2018 succeeded

The success of the summit came from 5 distinct areas only.

1. Keeping the core team small

The core team was only 6 people including:

- Myself - Chair - Responsible for Program, Speaker Selection, Profit, Ticket Sales, Overall Strategy and Partner Strategy
- Landi Jac - Co Chair - Consultant, Venue Negotiations, Program Advice, System & Procedure from an experience view
- Shari Bricks - Administration, Venue Management, Liaison, Stage Manager and Speaker Management

- Michael Smith - Websites, Technology and AV Management
- Elias Kanaris - Local Ambassador, Partners, Ticket Sales
- Bill James - Partnerships

This small team kept things tight. The incumbent NSANZ President during GSS2018 was inexperienced and unengaged, as were the majority of the NSANZ Board and Members until the last few weeks prior to the start of GSS2018. Having this tight team meant ‘no groupthink’. We could move and respond quickly and led to a better event overall, regardless of the input of a greater workload.

In particular, the availability of Shari and Michael and their negotiating skills with the venue and their experience at managing the run-in to and during the event was exceptional. Special recognition of the Bond Exec team has to be noted.

2. The Program

Most events of this nature create a theme and call for speakers to fill that theme. This - in my opinion - leads the event to have a thrown together feel with more keynote styles. The purpose of these conventions are not to listen to a bunch of keynotes; they are to educate, connect and improve people.

We created every step of the 4-day program before we did anything else. Expertise is needed here. We choreographed every session, to follow other sessions that made sense, to not call for big name speakers but to call for the right speakers in the right subjects. This meant a lot more work but gave a much stronger program, which was commented on by many attendees. We often heard that we have raised the bar on these events and we put those comments down to this.

Featured were keynote length plenary sessions of 40 minutes stage time; one 3 hour workshop (which people rated the highest of all sessions); breakouts of 35 minutes; and TED-style talks of 18 minutes. We covered the areas of:

- **Social** - including connection, social media, sales and marketing;
- **Technology** - including data, webinars, apps, LinkedIn etc; and
- **Mechanics** - including stage, building presentations, selling from stage, productisation and more.

We also added important current issues such as diversity, environment, legacy and social contribution. In 72 talks, we made sure there was something for everyone.

The program was also choreographed to the minute, including every song choice:

- Day one was local NZ music;
- Day 2 was Rock standards;
- Day 3 was Icons; and
- Day 4 was Dance Music.

Every song was especially chosen as was every song for when a speaker came or left stage. In addition, a variety of videos showcasing NZ, messages around the theme and entertainment were included. This extended to the live entertainment that was organised, including the 13-year-old (signed by Lorde’s management), who closed the event singing ‘We are the World’ acapella.

3. Partners

We did not have sponsors we had ***partners***. The investments for our partners ranged from $24,000 to $2,000. I am pleased to report that we raised over $70,000 in partnership funds.

This was a very difficult area and we suffered from not having a partnership team. In fact, the responsibility fell to one person, Bill James, supported by Elias, Landi and myself. NSANZ really dropped the ball here, yet regardless of us hitting only 50% of our budget, we perceived that we gained more in real partnership dollars than other conferences. Given the size of GSS2018 (it was approximately six times smaller than NSA US in size), it could be argued that overall what was raised was indeed a huge success.

We featured partners, gave them stage time in the breakouts, had the booths right in the flow of traffic and gave them killer deals in terms of what they received for their partnership dollars.

If we had a team on ground, we could have nailed this target and got very profitable.

4. Corporate Day

In the lead up to proposing New Zealand as the location for GSS2018, the NSANZ Board worked in conjunction with local bodies such as Tourism New Zealand and the Auckland Convention Burau (part of Auckland City Council). It was a strong requirement that GSS2018 be used as a vehicle to expose international Speakers to the New Zealand business community.

This translated itself into the Corporate Day, which extended to allowing us to invite non-Speakers to attend GSS2018. To attract these delegates to the event, we invited clients off our own lists, ran preview events (such as the ‘Tight 5’) and pitched at networks such as BNI, TNG etc. This resulted with 65 leaders of business joining us for the first day. A few bought tickets for the whole event and some chose to come to other sessions outside Day 1. Corporate Day gave a different buzz in the room, showed international delegates that NZ could get business leaders in the room to listen to them and some even got speakers booked.

Our idea of international speakers connecting with their embassies also brought further work and talks for the Dutch and French speakers who took up the idea.

5. Non-Reliance on Social media and Reliance on Pro-Active Marketing

We decided early that traditional marketing such as Facebook and expecting the GSF Ambassadors and Presidents of Associations to support the event would leave us too exposed to others’ whims and fancies. We decided the only way to sell tickets was to get right on the front foot and go head to head with the market. What worked was:

- The online lunch party and webinar which sold about 60 tickets;
- Visits and talks at various Associations around the world;
- Walking table to table at NSA US in Orlando at lunch and personally inviting people;
- Making phone calls to key people and asking them to come and recommend it to their list;
- Pitching GSS2018 to NSANZ meetings at least 4 times. The result was an over 50% of attendees were from New Zealand, and >75% of NSANZ members purchased tickets;
- Other webinars and online workshops; and
- Asking those chosen to speak to personally invite people they know who should be there.

What didn’t work

Very little! However, there were areas where I would suggest we wasted valuable time and resources, such as:

- Expectations on Associations and Ambassadors to assist. Very few did anything at all.
- Allowing non-screened ‘talent’ to do 5-minute slots. This was a last-minute thing to add colour to the event and allow attendees to shine in some unique skills they have. They didn’t. We had two poor singers on stage and one very disrespectful comedian at the charity event.
- Having NON-professional Partnership Salespeople. Bill James did a wonderful job, but from the start I was out voted on paying up to 50% commission to professional outfit who would close sales on partnerships. I would suggest any future chair hires professionals and pays a percentage very early on to secure well-paying partners.
- Not having an appointed accountant that could produce timely financial reports hindered our ability to provide accurate and up-to-date information on the profitability of this event. It is recommended that this position be considered a priority for future GSS events.

Disappointments

The following are stated as disappointments and warnings/considerations for other conferences going forward:

- There was limited assistance from the NSANZ President and Board (excepting Bill James and Elias Kanaris). Poor leadership led to us really carrying all the weight of the organising toward the latter stages when we required assistance to finalise volunteers, ticket sales and partnerships.
- There was limited assistance from other Associations, Presidents or Ambassadors. It appeared that most Ambassadors did not engage, regardless of promises to do so.
- Last minute cancellations of Speakers and other Speaker issues. Overall, I found the professionalism lacking in numerous Speakers who were involved in presenting. It was evident that overall the global community has a scarcity mentality, regardless of an air of it being a positive place to be involved. I see this as a major task for GSF to address and the reason why overall our standards for CSP are so low globally. It was also evident that very few Speakers can actually market and sell their services. This again is affecting the industry globally in terms of competing with savvy subject matter experts.
- There was one notable issue of service from within the venue and the service that they offered – the bar was not well manned causing some people a poor experience in this area.
- The Charity Auction missed the mark and the comedian that we used set up the room poorly.

WOW Moments

There were several wow moments in front of and behind the scenes:

- MC Ngahihi O Te Ra Bidois. Whilst he is no longer an NSANZ member he stepped up and was a brilliant Ambassador and highlight.
- The Sky City hotel was a premier destination. Our negotiation saved close to $100k in fees and AV costs. We negotiated hard. The food was excellent, and the AV was some of the best in the world. We worked hard on stage design and mood and it worked well.
- Suzy Lynch - local icon singing the National Anthem.
- 13-year-old singer closing with ‘We are the World’.
- Speeches by Fredrik Haren, Ennette Pauze, Ilja Grwkowski, Paul Huschilt were rated very highly.
- Gala Dinner and singing by Karen Jacobsen.
- Seeing the theme ‘From Leadership to Legacy’ lived out by many speakers.
- Raising around $15,000 for our chosen charity ‘The Global Dialogue Foundation’.
- The knock-on effect of hosting GSS2018 for NSANZ was that it attracted a further 15 Members to join the Association.

In summary, the program was excellent, venue the best fit for the convention of its type and delivered by a small and committed core team with a great overall result.

If I ran this again I would do three things differently.

1. Save money on a unique venue and gone away from the mainstream expectation. This could have saved $50K - $80K.
2. Put on a sales team for partnerships on a profit split from Day 1
3. Planned more previews to sell tickets locally and put a key sales person into each association conference to sell tickets internationally.

Mike Handcock
Co Chair GSS2018
14 April 2018

Running the Global Speakers Summit 2018 by Elias Kanaris

This document is written to supplement the report produced by Mike Handcock, Co-Chair GSS2018. It has been written to allow us to share additional experiences that would help other associations looking to run a Global Speakers Summit (GSS) in the future.

Learning lessons from GSS2018

There are 5 main learning lessons that I would like to share.

1. Pre-planning

Prior to applying to host the GSS, NSANZ worked closely with local agencies to help prepare a proposal which we submitted to the GSF. Here are a cross section of the agencies that we worked with:

- Tourism New Zealand
- Auckland Convention Bureau
- Auckland Tourism, Events and Economic Development (ATEED)
- Event Dynamcis (a PCO)

These organisations helped us to provide information on the location, travel and economic outlooks, as well as address the safety of the region. Our PCO was also able to help us to produce initial budgets (including indicative quotes from the venues that were most likely able to host GSS) which were used to estimate break-even points.

And organisations like ATEED provided funding to bring Shari and Michael over to New Zealand to undertake site visits, which helped us to reduce costs.

2. Accounts and Payment Portals

It is essential that you start the project with a payment gateway that can accept payments from international locations. For example, when GSS2018 was launched, we tried to use PayPal to collect payments for the Super Early-Bird non-refundable deposits. Unfortunately, for many APSS Members,

PayPal did not work in Singapore and they were declined. This resulted in the loss of about a dozen potential ticket sales.

Select a gateway like Stripe, which can be configured from day one for the pre-launch.

Make sure that you have an accountant on hand and that you set up a specific bank account to allow you to track and audit ALL financial transactions. Ensure that you select ONE ticket registrations system (i.e. do everything through your website and not through Eventbrite as well).

Have a qualified accountant appointed that can guide you on local tax issues (such as GST) and that can produce weekly updates and reports.

3. Get Board Involvement Up-front

On reflection, NSANZ went through a massive change in Board members half-way through the year. This proved to be very disruptive as many of the new Board members were not aware of historic decisions. On-boarding of new Board members needs to be carefully considered and implemented. Additionally, it is important that the whole Board engages with the project and takes responsibility as they have to account for potential losses should they occur.

4. Partnerships and the Corporate Day

One of the requirements from our local agencies (with ATEED being the most vocal) was for GSS2018 to have a day where local businesses could attend. In conjunction with this happening, we launched a Partnership program, which helped to make GSS2018 profitable.

When looking at partnerships going forward, make sure that:

1. You have more than one person heading the partnership program
2. You offer a '3D Partnership Program'. In our case, we approached partners and said, "Instead of you paying a speaker to speak at your next conference, here's a list of speakers who are willing to divert their fee and allow you to pay that towards GSS2018." This was a $5K investment that helped to balance the books.

5. Non-Reliance on Social media and Reliance on Pro-Active Marketing

Use the speakers at GSS to record a short 90 – 120 second video to be used for promoting their session and the GSS in general. These need to be top and tailed to brand GSS and can be used effectively via social media.

Once produced, ask the speaker to share it via their social media channels and put it onto a dedicated GSS Page where you can mix them up with memes produced to entice speakers to attend. And consider getting a local celebrity to become the face and voice for short video messages that can attract a wider corporate audience.

I trust these simple ideas will help the next association looking to bid for GSS2020.

Elias Kanaris
President Elect, GSF
22 June 2018

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Addendum B - US-Based Nonprofit Organization Policies Required by US Tax Law

[adopted July 2009]

The Internal Revenue Service (IRS) of the US has issued a new Form 990 annual tax return/report that must be submitted by most federal income tax exempt organizations including trade associations and professional societies. The new form is a result of key committees in the US Congress expressing the need for greater disclosure and improved governance in non-profit tax-exempt organizations. In order for the GSF to comply with these recent requirements, the policies listed below are officially adopted by the Board of Directors as part of our governance.

Not all of the verbiage in these policies currently applies to the GSF but may in the future. For that reason, those sections that are not currently applicable have been left in the document and do not require that we create new processes until there is applicability.

Whistleblower Policy

This Whistleblower Policy of the GSF:

1. encourages staff and volunteers to come forward with credible information on illegal practices or serious violations of adopted policies of the Organization;
2. specifies that the Organization will protect the person from retaliation; and
3. identifies where such information can be reported.
    1. Encouragement of reporting. The Organization encourages complaints, reports or inquiries about illegal practices or serious violations of the Organization’s policies, including illegal or improper conduct by the Organization itself, by its leadership, or by others on its behalf. Appropriate subjects to raise under this policy would include financial improprieties, accounting or audit matters, ethical violations, or other similar illegal or improper practices or policies.
    2. Protection from Retaliation. The Organization prohibits retaliation by or on behalf of the Organization against staff or volunteers for making good faith complaints, reports or inquiries under this policy or for participating in a review or investigation under this policy. This protection extends to those whose allegations are made in good faith but prove to be mistaken. The Organization reserves the right to discipline persons who make bad faith, knowingly false, or vexatious complaints, reports or inquiries or who otherwise abuse this policy.
    3. Where to report. Complaints, reports or inquiries may be made under this policy on a confidential or anonymous basis. They should describe in detail the specific facts demonstrating the basis of the complaints, reports or inquiries. They should be directed to the Organization’s chief employed Executive or Chairman of the Board of Directors; if both of those persons are implicated in the complaint, report or inquiry, it should be directed to the Vice President of the Board of Directors. The Organization will conduct a prompt, discreet, and objective review or investigation. Staff or volunteers must recognize that the Organization may be unable to fully evaluate a vague or general complaint,

report, or inquiry that is made anonymously.

Joint Venture Policy

This Joint Venture Policy of the GSF requires that the Organization evaluate its participation in joint venture arrangements under US federal tax law and take steps to safeguard the Organization's exempt status with respect to such arrangements. It applies to any joint ownership or contractual arrangement through which there is an agreement to jointly undertake a specific business enterprise, investment, or exempt-purpose activity as further defined in this policy.

1. Joint ventures or similar arrangements with taxable entities. For purposes of this policy, a joint venture or similar arrangement (or a "venture or arrangement") means any joint ownership or contractual arrangement through which there is an agreement to jointly undertake a specific business enterprise, investment, or exempt-purpose activity without regard to:
    1. whether the Organization controls the venture or arrangement;
    2. the legal structure of the venture or arrangement; or
    3. whether the venture or arrangement is taxed as a partnership or as an association or corporation for federal income tax purposes. A venture or arrangement is disregarded if it meets both of the following conditions:
        1. 95% or more of the venture's or arrangement's income for its tax year ending within the Organization's tax year is excluded from unrelated business income taxation [including but not limited to:
            1. dividends, interest, and annuities;
            2. royalties;
            3. rent from real property and incidental related personal property except to the extent of debt-financing; and
            4. gains or losses from the sale of property]; and
        2. The primary purpose of the Organization's contribution to, or investment or participation in, the venture or arrangement is the production of income or appreciation of property.
2. Safeguards to ensure exempt status protection. The Organization will:
    1. negotiate in its transactions and arrangements with other members of the venture or arrangement such terms and safeguards adequate to ensure that the Organization's exempt status is protected; and
    2. take steps to safeguard the Organization's exempt status with respect to the venture or arrangement. Some examples of safeguards include:
        1. Control over the venture or arrangement sufficient to ensure that it furthers the exempt purpose of the organization;
        2. Requirements that the venture or arrangement gives priority to exempt purposes over maximizing profits fo the other participants;
        3. That the venture or arrangement not engage in activities that would jeopardize the Organization's exemption; and
        4. That all contracts entered into with the organization be on terms that are arm's length or more favorable to the Organization.

Policy on the Process for Determining Compensation

This Policy on the Process of Determining Compensation of the International Federation for

Professional Speakers applies to the compensation of the following persons when employed by the Organization: The Organization's chief employed executive.

The process includes all of these elements:

1. review and approval by the compensation committee of the Organization;
2. use of data as to comparable compensation; and
3. contemporaneous documentation and recordkeeping.

1. Review and approval. The compensation of the person is reviewed and approved by the compensation committee of the Organization, provided that persons with conflicts of interest with respect to the compensation arrangement at issue are not involved in this review and approval.
2. Use of data as to comparable compensation. The compensation of the person is reviewed and approved using data as to comparable compensation for similarly qualified persons in functionally comparable positions at similarly situated organizations.

1. Contemporaneous documentation and recordkeeping. There is contemporaneous documentation and recordkeeping with respect to the deliberations and decisions regarding the compensation arrangement.

Document Retention and Destruction Policy

This Document Retention and Destruction Policy of the GSF identifies the record retention responsibilities of staff, volunteers, members of the Board of Directors, and outsiders for maintaining and documenting the storage and destruction of the Organization's documents and records.

1. Rules. The Organization' staff, volunteers, members of the Board of Directors and outsiders (i.e., independent contractors via agreements with the Organization) are required to honor these rules:
    1. paper or electronic documents indicated under the terms for retention below will be transferred and maintained by the administrative staff;
    2. all other paper documents will be destroyed after three years;
    3. all other electronic documents will be deleted from all individual computers, data bases, networks, and backup storage after one year; and
    4. no paper or electronic documents will be destroyed or deleted if pertinent to any ongoing or anticipated government investigation or proceeding or private litigation.
2. Terms for retention.
    1. Retain permanently:
        1. Governance records — Charter and amendments, Bylaws, other organizational documents, governing board and board committee minutes.
        2. Tax Records — Filed state and federal tax returns/reports and supporting records, tax exemption determination letter and related correspondence, files related to tax audits.
        3. Intellectual property records — Copyright and trademark registrations and samples of protected works.
        4. Financial records — Audited financial statements, attorney contingent liability letters.
    2. Retain for ten years:
        1. Pension and benefit records — Pension (ERISA) plan participant/beneficiary records, actuarial reports, related correspondence with government agencies and supporting

records
    2. Government relations records — State and federal lobbying and political contribution reports and supporting records.
3. Retain for three years:
    1. Employee/employment records — Employee names, addresses, social security numbers, dates of birth, INS Form I-9, resume/application materials, job descriptions, dates of hire and termination/separation, evaluations, compensation information, promotions, transfers, disciplinary matters, time/payroll records, leave/comp time/FMLA, engagement and discharge correspondence, documentation of basis for independent contractor status (retain for all current employees and independent contractors and for three years after departure of each individual).
    2. Lease, insurance, and contract/license records – Software license agreements, vendor, hotel and service agreements, independent contractor agreements, employment agreements, consultant agreements, and all other agreements (retain during term of the agreement and for three years after the termination, expiration, and non-renewal of each agreement).
4. Retain for one year:

● All other electronic records, documents and files – Correspondence files, past budgets, bank statements, publications, employee manuals/policies, procedures, survey information.

3) Exceptions. Exceptions to these rules and terms for retention may be granted only by the Organization’s chief staff executive or Chairman of the Board of Directors.

Conflict of Interest This Conflict of Interest Policy of the GSF: (1) defines conflicts of interest; (2) identifies classes of individuals within the organization covered by this policy; (3) facilitates disclosure of information that may help identify conflicts of interest; and (4) specifies procedures to be followed in managing conflicts of interest.

1 Definition of conflicts of interest. A conflict of interest arises when a person in a position of authority over the organization may benefit financially from a decision he or she could make in that capacity, including indirect benefit financially from a decision he or she could make in that capacity, including indirect benefits such as to family members or businesses with which the person in closely associated. This policy is focused upon material financial interest of, or benefit to, such persons.

2 Individuals covered. Persons covered by this policy are the organization’s officers, directors, chief employed executive and chief employed finance executive.

3 Facilitation of disclosure. Persons covered by this policy will annually disclose or update to the Chairman of the Board of Directors on a form provided by the organization their interests that could give rise to conflicts of interest, such as a list of family members, substantial business of investment holdings, and other transactions or affiliates with business and other organizations or those family members.

4 Procedures to manage conflicts. For each interest disclosed to the chairman of the Board of Directors, the Chairman will determine whether to: (a) take no action; (b) assure full disclosure to the Board and other individuals covered by this policy; © ask the person to recues from participation in related discussions of decisions within the organization; or (d) ask the person to resign from his or her position in the organization or, if the person refuses to resign, become subject to possible removal. The organization’s chief employed executive or chief employed finance executive will monitor proposed or ongoing transactions for conflicts of interest and disclose them to the Chairman of the Board of Directors in order to deal with potential or actual conflicts, whether discovered before or

after the transaction has occurred.

Conflict of Interest Forms will be distributed at the beginning of every budget year in January to be completed, signed and returned to the Organization’s office.

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Addendum C – Procedure Document for guiding the nomination questions to ask of a presidential candidate

After the GSF Secretary or appointed staff has collected the nominations and contacted the nominees to verify their intent to serve if elected, the GSF Secretary or appointed staff will send the appropriate request for information to the nominee for them to complete and submit for the nominating committee's evaluation process. Once the information is returned, the GSF Secretary or appointed staff will compile the information for the nominating committee in the following format:

- Nominee's Name
- Nominating Board of Directors (in the case where one nominee received several different nominations, the names of all Boards will be listed)

Qualifications attached including:

- Brief personal history, education, career
- Experience in the speaking business
- Experience in leadership in home association
- Awards, honors, earned designations

Responses to nominations questions

The following are examples of what should be included:

- Why do you want to be President of GSF?
- What skills and experience do you have that qualify you to lead GSF successfully?
- How would you describe your style of leadership?
- What positions of responsibility have you held in your home association?
- What are the three most important lessons you've learned from the positions you have held?
- What languages do you speak?
- What will the GSF look like at the end of your presidential term?
- What concerns you about the future of the GSF?
- What are the greatest opportunities available to the GSF?
- What role should the Board of Directors and/or Steering Committee play in creating opportunities and how would you facilitate this role?
- What is your strategy for better utilizing technology to connect and communicate with the GSF members?
- What is the priority work of the GSF that needs to be addressed within your leadership term?
- How can we serve our Associations so that they provide quality professional development and make sure their organizations is relevant?

Nomination Criteria

Skills and Abilities:

- Demonstrated ability to develop strong relationships
- Recognized as a leader in their home nation
- Excellent communication skills
- Committed to the overall mission of the Federation to support and encourage member associations
- Professional
- Able to see an issue from a variety of positions
- Globally aware and internationally astute
- Demonstrated an ability to adopt an international perspective on issues and relationships

Speaking Expertise and Experience:

- Demonstrated and recognized skills on the platform
- Although not required, it is helpful to hold the CSP designation
- Established, successful speaking business
- Adequate resources to support the travel and schedule commitments of the position

Level of leadership experience in member association:

- Demonstrated leadership abilities at a senior level; having served as an officer or board member at their speaker association's national level.
- The Federation president must understand how associations work in order to support their ability to be effective as the leader of the Federation.

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Addendum D – GSF Ethics Resource Pool Policy

(May 2014)

In 2005, The Global Speakers Federation created an Ethics Resource Pool.

Here's the relevant information

Background:

The Federation exists to do those things that individual member associations cannot practically do for themselves.

One of these is to provide a mechanism for input to/resolution of ethics issues for the member associations. Some of the associations are too small to have an "ethics committee" that would have any perception of independence or impartiality. All of them have the potential of a situation arising where obviously arms-length input could be a valuable thing.

The Ethics Resource Pool is a list of people, from which an ad hoc "committee" could be chosen, if and when the need might arise. The maximum size of any given committee would be 7 people, out of those on this list.

It is specifically noted that such a committee does not have the power to impose resolution, nor make binding judgments. It can only advise the association, or make recommendations. Each association will then take whatever action it deems appropriate.

The Pool is not available to individuals. It is a resource to 'member associations' only.

This pool is made up of people who are recognized for their high personal integrity and have sufficient expertise in the business to provide valuable input.

This is not a pro-active or standing committee and only comes "into existence" should it be called upon to serve. At the conclusion of any given undertaking, the committee reverts to dormant.

Below is the relevant excerpt from the official minutes, and a list of those who have agreed to serve.

" . . . a pool of 25 to 35 individuals whose high personal integrity is globally recognized, so that any member association could form, from this pool, an ad hoc ethics committee should they have need to do so or have need of a source for commentary on ethics issues."

Ethics Resource Pool, May 2014:

Name	Country	Status
Alan Stevens	UK	new
Amanda Gore	Australia	new

Name	Country	Status
Beverly Babb	USA	new
Claudia Haider	Germany	new
Dale Irvin	USA	new
David Penglase	Australia	original
David Price	Australia	original
Derek Arden	UK	new
Gaby Graupner	Germany	new
Glen Capelli	Australia	original
Janelle Barlow	USA	new
John Molidor	USA	new
Kit Grant	Canada	original
Lindsay Adams	Australia	new
Lisa Ford	USA	new
Marjorie Brody	USA	new
Mike Kerr	Canada	new
Naomi Rhode	USA	new
Paul ter Wall	Holland	new
Peter Brandl	Germany	new
Randy Pennington	USA	original
Robyn Pearce	New Zealand	new
Roger Harrop	UK	new
Ron Kaufman	Singapore	original
Scott McKain	USA	new
Stef DuPlessis	South Africa	new
Susan Sweeney	Canada	new
Terry Paulson	USA	original
Tom Stoyan	Canada	new
W. Mitchell	USA	original
Warren Evans	Canada	(deceased)

Procedures & Protocols:

1. An association Executive Director forwards an ethics “file” to the GSF Executive Director.
2. GSF ED reviews and determines an appropriate committee chair from the Resource Pool. GSF ED forwards file to the committee chair.
3. GSF ED sends this Resource Pool list to each of the two parties with instructions for each of them to choose three names from the list that they would like to see on the committee and return their choices to the GSF ED. (Association ED(s) have no further, active role in this process).
4. Chair will choose one name from each party’s list of three to create the committee.
5. Committee will determine if the issue at hand requires a larger committee to address the issue. If so, step 3 is repeated with the full Resource Pool list minus the previous 6 names chosen by the parties sent back to the two parties involved. (The committee membership is a maximum of seven and numbers should be adjusted accordingly).
6. Chair will advise GSF ED if additional information is required from the parties and the GSF ED will collect and forward same.

7. Chair will forward committee's findings* to GSF ED who will forward to the respective parties and association ED(s).
8. Committee returns everything received from each party to that party, keeping only a copy of their findings*.
9. Committee disbands.

*The committee has no power to impose decisions, penalties, binding judgments, or other remedies. It can only advise the association, provide analysis, offer opinion, and make recommendations. Each association will then take whatever action it deems appropriate.

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Addendum F – GSF Charitable Gift/Donation Policy and Guidelines

Mission Statement

The mission of the Global Speakers Federation is to champion, support, and provide resources to help develop and grow associations of professional speakers worldwide.

Value Proposition

The Global Speakers Federation's Value Proposition is threefold:

1. To strengthen worldwide recognition of professional speaking within the meetings industry.
2. To provide support to member associations on forming, managing, and leading associations, including sharing best practices.
3. To build a global community of like-minded people to encourage alliances, connections, and support networks.

Purpose of Policy

This Charitable Gift/Donation Policy serves as a guideline for the Global Speakers Federation (hereafter known as the GSF) Board members, Committee members, volunteers, staff, outside advisors (who may assist in the gift planning process), and prospective donors (who may wish to make gifts/donations to the GSF of unrestricted, restricted, and endowment funds).

The GSF may actively solicit gifts, donations, and grants to further its mission. As gifts can encourage others to give, the GSF Gift/Donation Policy is intended to serve as a guide and to allow for flexibility on a case-by-case basis.

Guidelines

The following guidelines serve to assist the GSF with regard to charitable gifts/donations:

1. The President, any Board member, any Committee member, any volunteer, the Executive Director, and staff of the GSF have the authority to solicit gifts/donations on behalf of the GSF.
2. The President of the GSF will create a Gift/Donation Review Committee, which would be responsible for making a recommendation to the GSF Steering Committee whether the GSF should accept (or not accept) proposed gifts/donations. The GSF Steering Committee, in turn, would make a recommendation to the GSF Board of Directors.
3. The Gift/Donation Review Committee shall consist of no less than three (3) members from the Board of Directors as well as the GSF President as a non-voting member. The Executive Director of the GSF shall be a non-voting member and the convener of the Committee. The Chairperson shall have the authority to appoint other volunteers or to establish, on an ad hoc basis, individuals who have special expertise that may be needed to help facilitate making a decision on a specific gift/donation.
4. The Gift/Donation Review Committee may consider each gift, on its own merit, according to its

intended use, restrictions, liabilities, and financial impact on the GSF, now and in the future. Only gifts, bequests, devises, endowments, trusts, and similar funds that are designated for the use by the GSF and that are consistent with the stated mission of the GSF will be considered for acceptance.

5. The Executive Director will refer any gift/donation to the Gift/Donation Review Committee for review. Any gifts/donations that are given with any unusual restrictions or designations, that have the potential to jeopardize the tax-exempt status of the GSF or that violate GSF policies and/or local, state, federal, or national laws will have to be reviewed.

Types of Gifts/Donations

The following categories (and provisos) are used to differentiate what types of gifts/donations may be considered by the GSF:

Cash

- Regardless of the amount, the GSF shall accept all gifts by cash, credit card, or check.
- Checks shall be made payable to the Global Speakers Federation unless otherwise specified.
- In no event, shall a check be made payable to an individual who represents the GSF.

Publicly Traded Securities

- The GSF can accept readily marketable securities, such as those traded on a stock exchange. Gift securities are likely to be sold immediately by the GSF.
- For the GSF's gift crediting and accounting purposes, the value of the securities is the average of the high and low on the date of the gift, in accordance with IRS regulations.

Closely Held Securities

- Gifts of closely held corporate stock would be carried on GSF's books at $1US in the absence of financial information that would enable determination of book value.
- Such securities will be carried at book value until audited financial statements are provided to the GSF so that book value can be substantiated, or the donor provides a qualified appraisal in compliance with IRS/national regulations.
- An appraisal of securities may be conducted under the direction of the GSF to determine both value and potential for sale.
- Gifts of securities that require a holding period will be accepted and sold when the holding period has expired.
- Gifts of securities that will not be accepted include: securities that are assessable or in any way could create a liability to the GSF; securities that, by their nature, may not be assigned (e.g., such as "S" corporation stock); securities that on investigation have no apparent value.

Real Estate

- The Gift/Donation Review Committee will review gifts of real estate. The donor is responsible for obtaining an appraisal of the property, unless otherwise determined by the GSF.

- A member of the Gift/Donation Review Committee must conduct a visual inspection of the property. If the property is located in a geographically distant area, a local real estate broker may substitute for a member of the Committee in conducting the visual inspection. The GSF may also require an environmental site assessment including Title V status for possible contamination, (i.e., leaking underground storage tanks) or other restrictions (i.e., wetlands).
- Due to the expenses associated with gifts of real estate, only gifts valued in excess of $10,000 will be accepted.
- Prior to presentation to the GSF Steering Committee (and ultimately to the GSF Board of Directors), the donor must provide the following documents: real estate deed; real estate tax bill; plot plan; substantiation of zoning status; and environmental site assessment.
- If the donor is giving a life estate gift, the donor may be asked to pay for all or a portion of the following: maintenance cost; real estate taxes; insurance; real estate broker's commission: other costs of sale; and appraisal costs.
- If the real estate is an outright gift, the GSF will pay for these costs.
- For the GSF's gift/donation crediting and accounting purposes, the value of the gift/donation is the appraised value of the real estate, excluding any costs to the GSF for insurance, real estate taxes, broker's commission, or other expenses of the sale.
- Properties with mortgages will be considered on a case-by-case basis. Consideration may include an independent appraisal and the mortgage percentage of property value. Mortgaged property is not acceptable for charitable remainder trusts.

Life Insurance

- The GSF will accept gifts/donations of life insurance policies only when the GSF is named as the owner and beneficiary of 100% of the policy.
- If the policy is paid-up, the value of the gift for GSF's gift/donation crediting and accounting purposes is the policy's replacement costs.
- If the policy is partially paid up, the value of the gift for GSF's gift/donation crediting and accounting purposes is the policy's cash surrender value.

Tangible Personal Property

- Gifts of tangible personal property to the GSF should have a use related to GSF's exempt purpose.
- Gifts of jewelry, artwork, collections, equipment, and software shall be accepted with approval by the GSF. Other matters that will be taken into consideration by the GSF before deciding on acceptable gifts of personal property include: transportation cost; storage cost; cost of selling; cost of maintenance and repairs; location of property; cost of insurance.
- Such gifts of tangible personal property, as defined above, shall be used by or sold for the benefit of the GSF.
- Depending upon the anticipated value of the gift, the GSF shall have a qualified

outside appraiser value the gift before accepting it.

- The GSF adheres to all IRS requirements for disposing gifts of tangible personal property and for filing appropriate forms.

Planned Gifts and Memorials

- The staff, volunteers and GSF member associations shall encourage assets transferred through bequests that have immediate value to the GSF, or that can be liquidated. Gifts that appear to require more cost than benefit shall be discouraged or rejected.
- The GSF may accept and administer bequests and memorials designated for specific purposes.

Administrative Issues

- The GSF and its staff shall not act as an executor (personal representative) for a donor's estate.
- The GSF may act as co-trustee of a charitable trust when the trust names GSF as a beneficiary of 50% or more of the trust.
- The GSF will pay for the drafting of legal documents for a charitable remainder trust of which the GSF is named as a beneficiary of 50% or more of the trust. The donor's own counsel must review the documents at the donor's cost.
- Terms and conditions must be agreed upon before an endowment is established; therefore, contact with the GSF's Executive Director for appropriate documentation is required. A minimum contribution is required to establish a named endowment.
- For restricted and endowed funds, if future circumstances change, or the donor fails to fulfill his/her pledge obligation, or the purpose for which the fund is established becomes illegal, impractical, or no longer meets the needs of the GSF, it may designate an alternative use in the spirit of the donor's original intent for the gift to further the objectives of the GSF.

This policy is to be reviewed annually by the GSF Steering Committee.

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Addendum G – GSF Board Members – Staggered Term of Office Initial Association Rotation

Initial Association Rotation – 2021

Group A	**Group B**	**Group C**
1 Year term beginning July 1, 2021 – June 30, 2022	2 Year term beginning July 1, 2021 – June 30, 2023	3 Year term beginning July 1, 2021- June 30, 2024
GSA	CAPS	NSA
AFCP	PSA UKI	APSS
NSA Sweden	PSA Australia	PSAI
PSA NZ	CISSA	PSASA
MAPS	PSA Belgium	PSA Holland
	PAPS	
Appoint new 3-year term commencing July 1, 2022 to June 30, 2025	Appoint 3-year term commencing July 1, 2023 to June 30, 2026	Starts on a 3-year cycle July 1, 2021 – next appointment will be July 1, 2025

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Addendum H – GSF Social Media Strategy

The goal of GSF's social media strategy is to increase the visibility and reach of the Federation to engage with the current 17-member associations and to build and strengthen GSF's brand reputation, which will help GSF with…

1. **Increased visibility:** Increase the reach of GSF enabling us to connect with a wider audience.
2. **Brand building:** Reinforce the brand reputation of GSF, increasing our credibility and influence.
3. **Improved engagement:** Foster meaningful connections between GSF and its member associations.
4. **Increased event exposure:** Promote registrations for GSF events (GSS Summit) and its member associations (Annual Conventions).
5. **Knowledge sharing:** Facilitate knowledge sharing between GSF and its member associations.
6. **Increased membership:** Strengthen GSF community by attracting associations that are not part of GSF.
7. **Information sharing:** Additional vehicle to communicate happenings within the GSF and its member associations

The target group of all GSF social media activities is ***Member-Associations*** of GSF (currently 17) and **Non-Member Associations**.

The focus is not on catering to individual speakers, trainers, authors, etc., although GSF's presence might help them explore their local associations. Even if individual speakers might follow GSFs social media accounts, the goal is to bring awareness to them about their member associations (redirection).

Background

GSF has accumulated a variety of unmonitored and inactive groups, pages and profiles on various platforms. Administrative roles are inconsistent and not centralized. Community groups (FB and LinkedIn) are used by individuals to promote events or post inspirational content, yet in the perception of visitors may be that these are part of GSF's social media activities. On GSF's official outlets the association lacks consistent posting and misses out on opportunities to engage.

Benefits

GSF can build a strong online presence, establish a positive reputation to demonstrate its value to member association, also by promoting their associations, leadership or events.

Content ideas to demonstrate the value

- ***GSF goals, vision, and mission:*** Promote GSF and educate on its vision and mission.
- ***GSF member benefits:*** Share the benefits of membership in GSF.
- ***GSF membership requirements:*** Share details about the requirements to join GSF as an association.
- ***GSF leadership:*** Introduce the Presidential Leadership team and board members of GSF.
- ***GSF history:*** Describe GSF's past and present and why it is the go-to-resource for associations worldwide.
- ***GSF award winners:*** Introduce and celebrate past and present award winners.
- ***GSF Global Speaking Fellow promotion:*** Describe the requirements and application process.

- ***GSF Global Speaking Fellows:*** Introduce past and present Global Speaking Fellow recipients.
- ***Professional Speakers Celebration Day:*** Promote and celebrate March 14th.
- ***GSF member association spotlights:*** Highlight member associations (goals, achievements, impact.)
- ***GSF events:*** Promote the GSS Summit, highlight summit presenters, and encourage associations to share.
- ***Association glossary:*** Explain common terms that association leaders should be familiar with.
- ***Member association leadership:*** Congratulate and thank new Presidents of associations.
- ***Member association events:*** Promote on annual conventions hosted by member associations.
- ***Best practices and tips:*** Share advice on topics such as membership growth, event planning, marketing.
- ***Association resources:*** Promote resources available in the GSF Library.
- ***Success stories:*** Highlight achievements of member associations and impact on the speaking industry.

By taking advantage of GSF's presence in social media, member associations can

- leverage their affiliations with GSF to gain recognition.
- increase their visibility and reach on a global level.
- increased knowledge and understanding of GSF’s role
- strengthened relationships between member associations
- improve engagement between GSF and its member associations and their respective audiences.
- access to resources and best practices from GSF and other member associations.

Implementation

PHASE 1 (MARCH & APRIL 2023) – CLEAN UP
PHASE 2 (MAY & JUNE) — CONTENT AND SYSTEMS
PHASE 3 (JULY & AUGUST) — MONITORING AND ADJUSTMENTS
PHASE 4 (SEPTEMBER & OCTOBER) — EMAIL MARKETING

PHASE 1 — CLEAN UP

1. ***CLOSE ALL INACTIVE SOCIAL MEDIA PAGES OR GROUPS***
    1. Negative image: Inactive groups and pages show a lack of attention and effort from the federation and can make GSF appear unreliable and untrustworthy to our audience.
    2. Better management: Closing down inactive groups and pages simplifies the management and monitoring of social media accounts, making it easier to maintain a consistent brand image.
    3. Wasted resources: Maintaining inactive groups and pages requires time, effort, and money. Closing down inactive groups and pages frees up resources that can be used to create new and engaging content on active platforms.
    4. Confuses audience: Inactive groups and pages can confuse GSF’s audience and make it difficult for them to find relevant and up-to-date information.
    5. Decreased engagement: Keeping inactive groups and pages reduces overall engagement and can limit the growth of active ones.
    6. Increased security risk: Inactive groups and pages can become a security risk as they can be hacked and used for malicious purposes.
    7. Decreased analytics data: Keeping inactive groups and pages can skew analytics data and make it difficult to measure the effectiveness of GSF’s social media campaigns accurately.

8. Improved social media strategy: Closing inactive groups and pages allows the federation to focus on the platforms where our audience is actively engaged.
9. Before closing REDIRECT existing members/followers to the new, active social media channels.

2. ***SIGN UP FOR ALL SOCIAL MEDIA PLATFORMS***
    1. Protecting the brand: By owning all social media accounts, GSF can prevent others from creating accounts that might negatively impact the federation's reputation.
    2. Maintaining control: By owning all accounts, GSF can maintain control over the content, messaging, and overall image of the federation on social media.
    3. Consistency: Owning all social media accounts ensures consistency in branding and messaging across all platforms, strengthening the federation's image and reputation.
    4. Protecting intellectual property: Owning all social media accounts helps protect GSF's intellectual property and ensures that others cannot use GSF's name or content without permission.
    5. Future use: Even if GSF is not actively using all social media accounts, owning them allows the federation to reserve the names/handles for future use.
3. ***STANDARDIZE ALL NAMES/HANDLES ACROSS PLATFORMS***
    1. Brand recognition: Consistent branding across all platforms increases brand recognition and helps build a stronger brand identity for GSF.
    2. Improved discoverability: Having the same name or handle across all platforms makes it easier for audiences to find and follow the federation, increasing the reach and impact of GSF.
    3. Improved engagement: By making it easier for audiences to find and follow the federation, a consistent name or handle can increase engagement and interactions.
    4. Better analytics: Using a consistent handle across all platforms allows for more accurate tracking and analysis of social media activity, making it easier to evaluate the success of GSF's social media campaigns.
    5. Increased trust: Consistent branding across all platforms can increase trust and credibility, as audiences are more likely to engage with brands that have a strong, recognizable brand.
    6. Better cross-platform promotion: A consistent name or handle makes it easier to promote the federation and its content across multiple platforms, increasing its reach and impact.
4. ***SUGGESTED NAME: VoiceofGSF (considering limitations of min. 5 to max 15 characters):***
    - Facebook: available (https://www.facebook.com/voiceofgsf) - ACTIVE
    - Youtube: available (https://www.youtube.com/@voiceofGSF) - ACTIVE
    - Twitter: available (https://twitter.com/VoiceofGSF) - PARKED
    - Instagram: available (https://www.instagram.com/voiceofgsf) - ACTIVE
    - LinkedIn: available (https://www.linkedin.com/in/voiceofgsf/) - ACTIVE
    - Tiktok: available (https://www.tiktok.com/@voiceofgsf) - PARKED
    - Pinterest: available (https://www.pinterest.com/voiceofgsf) - PARKED
    - Snapchat: available (https://www.snapchat.com/add/voiceofgsf) - PARKED
    - Vimeo: available (https://vimeo.com/voiceofgsf) – PARKED
    - ACTIVE: refers to platforms that GSF plans to publish content in the future
    - PARKED: refers to platforms that GSF plans to secure the handle/URL but does not plan to publish content
5. ***CREATE CENTRAL EMAIL ADRESS FOR ALL SOCIAL MEDIA ACTIVITIES***
    - Suggested email: voiceofgsf@globalspeakersfederation.com
    - Suggested admins: Shari Bricks, Michael Smith, Sylvie di Giusto (temporary)
    - Eliminate communications@globalspeakersfederation.com (unmonitored, unreachable)
    - Create a dedicated email address (voiceofgsf@globalspeakersfederation.com) that is used

to administrate social media channels.

6. ***REPORT IN NEXT BOARD MEETING AND INTRODUCTION OF PHASE 2***

PHASE 2 — CONTENT AND SYSTEMS

Having successfully laid the foundational groundwork in Phase 1, where we streamlined GSF's social media presence and established a unified brand identity, GSF is ready to transition into Phase 2. Phase 2 is the extension of our initial efforts and a strategic evolution as it's designed to be the engine that drives GSF's digital transformation on the following platforms:

- **LinkedIn:** linkedin.com/c/voiceofgsf
- **Instagram:** instagram.com/voiceofgsf
- **Facebook:** facebook.com/voiceofgsf
- **YouTube:** youtube.com/@voiceofgsf

1. **Target Audience Identification:**
    1. ***Primary Audience:*** Member-Associations of GSF (currently 17) and Non-Member Associations
    2. ***Secondary Audience:*** NOT individual members (speakers, trainers, authors, coaches, consultants) of each association, although they might be interested in following GSF.
2. **Content Design**
    - ***Color Palette***
    - ***Font Choices***
    - ***Design Style***
    - ***Logo***
3. **Content Calendar**
    1. LinkedIn, Facebook, Instagram: two scheduled (image) posts per week (Tuesday, Thursday)
    2. YouTube: when applicable
4. **Content Creation and Suggested Topics:**
    1. ***GSF goals, vision, and mission:*** Promote GSF and educate on its vision and mission.
    2. ***GSF member benefits:*** Share the benefits of membership in GSF.
    3. ***GSF member associations:*** Promote existing members associations.
    4. ***GSF member association spotlights:*** Highlight member associations' goals and local impact.
    5. ***GSF membership requirements:*** Share details about the requirements to join GSF as an association.
    6. ***GSF leadership:*** Introduce the Presidential Leadership team and Board Members of GSF.
    7. ***GSF history:*** Describe how and when GSF hast become to go-to-resource for speaker associations.
    8. ***GSF award winners:*** Introduce and celebrate past and present GSF award winners.
    9. ***GSF Global Speaking Fellow promotion:*** Describe the process to become a Global Speaking Fellow.
    10. ***GSF Global Speaking Fellows:*** Introduce past and present Global Speaking Fellow recipients.
    11. ***Professional Speakers Celebration Day:*** Promote and celebrate March 14th.
    12. ***GSF events:*** Promote the GSS and encourage associations to share and speakers to sign up.
    13. ***GSF initiatives:*** Share initiatives and programs led by GSF.
    14. ***Association glossary:*** Explain common terms that association leaders should be familiar with.
    15. ***Member association leadership:*** Congratulate new Presidents of associations and

thank for their service.

16. ***Member association events:*** Promote upcoming (annual) events hosted by member associations.
17. ***Best practices:*** Share tips for associations and leaders (membership growth, event planning, marketing.
18. ***Association resources:*** Share resources and information that can help associations (GSF Library.)
19. ***Success stories:*** Share success stories from member associations, highlighting their achievements.
20. ***Sponsorship opportunities:*** Encourage sponsorship opportunities to support GSF or the speaking industry.
21. ***Ongoing stories:*** presidential coverage (e.g. President visits annual conventions.)

5. **Content Governance:**
    1. ***Neutral Political Stance:*** cannot endorse or criticize any political parties, candidates, or ideologies.
    2. ***Sensitive Topics:*** no posting or commenting on topics such as race, religion, or personal opinions.
    3. ***Inclusive Language:*** language that is respectful regardless of gender, race, ethnicity, or nationality.
    4. ***Cultural Sensitivity:*** mindful of cultural differences and norms as viewed by a global audience.
    5. ***No Individual Highlights:*** instead maintain focus on the collective goals s of member associations.
    6. ***Transparency:*** indicate the source of any statistics, quotes, or data used in content.
    7. ***Fact-Checking:*** verify all information before posting to ensure accuracy and credibility.
    8. ***Brand Consistency:*** ensure that all content aligns with GSF's brand voice, design, mission, and values.
    9. ***Non-Commercial Tone:*** no overly promotional language; focus on value, information and education.
    10. ***Accountability:*** in the event of mistakes commit to being transparent and corrections made promptly.
    11. ***Following individual accounts:*** limit GSF’s following to member associations and not individual speakers.
    12. ***User generated content:*** disallow content published by users or don’t reshare it.
    13. ***Content approval:*** centralized at GSF staff and Social media team.
6. **Content Scheduling**
    - ***Advantages***
        - **Time savings:** batch-create and schedule posts in single sessions.
        - **Increased efficiency:** streamlines the process, reduces the chances of errors and duplicated effort.
        - **Improved organization:** clear overview of scheduled content, making it easier to track progress.
        - **Better content planning:** allows planning GSFs content more effectively.
        - **Cross-platform consistency:** maintains a consistent brand image and messaging across platforms.
        - **Better analytics:** detailed and central analytics allow GSF to adjust its strategy as needed.
    - ***Disadvantages***
        - **Lack of flexibility:** limits the ability to respond quickly to current events or trending topics.
        - **Less visibility and engagements:** platforms decrease reach when scheduled

with third-party software.
- **Inflexibility in response to feedback:** challenging to adjust content based on feedback.
- **Reduced authenticity:** may not feel as genuine or spontaneous compared to ad-hoc postings.
- **Decreased sense of urgency:** may not convey a sense of urgency compared to ad-hoc postings.
- **Sensitivity:** GSF must ensure that can be paused during emergency situations, natural disasters, crises.

PHASE 3 — MONITORING AND ADJUSTMENTS

tbd

PHASE 4 — EMAIL MARKETING

Having successfully laid the foundational groundwork in Phase 1+2, where we streamlined GSF's social media presence and established a unified brand identity, GSF is ready to transition into Phase 4 focusing on e-mail marketing.

- **OBJECTIVE OF NEW EMAIL MARKETING STRATEGY**
  - Share regular GSF updates to keep member associations and subscribers informed and involved.
  - Promote upcoming association events to drive attendance and participation.
  - Provide valuable resources and educational content.
  - Spotlight federation and association leaders, bringing a personal touch to our global community.
  - Simplify the editorial and technical process to reduce time-to-publish.
  - Establish tools to measure newsletter effectiveness (open rates, click-through rates, subscriber growth).
  - Strengthen GSF's overall brand and positioning.
  - Exemplify excellence and set a communication benchmark for member associations.
- **TARGET AUDIENCE IDENTIFICATION**
  - Primary Audience: Member-Associations of GSF (currently 17) and Non-Member Associations, association leaders on national/regional/chapter level.
  - Secondary Audience: individual members (speakers, trainers, authors, coaches, consultants) of each association.
- **LIST SEGMENTATION**
  - Group 1: Import of past recipients+
  - Group 2: Current Presidents/Incoming Presidents/Vice Presidents of associations+
  - Group 3: GSF Representatives+
  - Group 4: Past GSF Presidents/Representatives+
  - Group 5: Presidents/Board Members/Leadership national/regional/chapter level++
  - Group 6: Individual Speakers / Future Leadership national/regional/chapter level++
  - Group 7: Other Associations
    - +Recommended to confirm opt-in after import for list health
    - ++Manual Opt-in via website (in the future might consider lead magnet)
- **SUBSCRIBER DATA**
  - Past Recipients: Import existing subscriber list and re-engage via initial email to reconfirm subscription.
  - Social Media Engagement: Utilize GSF social media channels to invite new subscribers.
  - Associations: Encourage member associations to promote the newsletter within their

networks.
    - Lead Magnet: Offer a valuable resource on the GSF website as an incentive for new subscriptions.
- **CONTENT STRATEGY**
    - Newsletter
        - Focus Topic: fostering continuous learning within the GSF community.
        - What's Currently Happening at GSF?: giving a transparent view into the federation's latest initiatives, promoting a sense of inclusivity.
        - Digital Buzz: showcasing content shared across GSF's social media channels.
        - Upcoming Events Around the Globe: promoting annual conference of GSF’s member associations.
        - Leadership Spotlight: introducing GSF and member association leaders.
        - Recommended frequency monthly (list engagement/list health), yet has to be determined based on effort and time investment for GSF volunteer.
        - Evergreen
            - Join the Global Celebration: rallying community for each year’s Professional Speakers Celebration Day.
            - Curious About GSF?: addressing common inquiries, ensuring subscribers know how to leverage GSF benefits.
            - Website Links: guiding subscribers toward specific areas on the GSF website.
            - Social Media Links: connecting subscribers seamlessly with GSF's social platforms.
            - Contact Details: ensuring subscribers can reach out with questions, feedback, etc.
    - Ad-Hoc-Updates
        - to address special announcements and significant occasions.
        - should be reserved for essential communication that warrants immediate attention.
        - recommended that their frequency is kept to a minimum.
        - should be subject to approval by the President.
    - Transactional e-mails
        - Subscription Confirmation: confirming successful subscription and welcoming to the community.
        - Unsubscribe Confirmation: confirming removal from the mailing list and providing options to resubscribe.
        - Feedback Survey: gathering feedback from subscribers about their newsletter experience.
    - Automated Workflows (evergreen, with links to website)
        - Welcome to GSF: welcoming new subscribers, outlining the mission and vision of GSF, providing links to essential resources on the website.
        - Meet Our Leadership: introducing subscriber to the individuals leading the federation.
        - Join Us on Social Media: encouraging to connect with GSF on social media platforms.
        - Explore Our Resources: inviting subscribers to check out GSF's resource library.
        - Global Speaker Fellow: providing an overview of the Global Speaker Fellow designation.
    - Lead Magnet sequence (evergreen)
        - Immediate Delivery: thanking subscriber and delivering the promised resource or content.
        - Feedback Request: requesting feedback on the lead magnet content after a while.
- **CONTENT CREATION**
    - By shifting from a “pull” to a “push” process, GSF can leverage its existing digital

presence (social media and website) to create a timely newsletter while streamlining the content management and distribution workflow.
    - Previous Pull Process:
        - Newsletter Manager reached out to associations, requesting content contributions.
        - Content was manually transferred from various sources (emails, documents, etc.) into a PDF format.
        - Manual design and formatting of the newsletter.
        - Manual distribution to a predefined list of recipients.
    - Proposed Push Process:
        - Utilize existing content from GSF's social media accounts and website, which already includes updates, event highlights, and member spotlights, etc.
        - Curate and organize existing content into a templated web-based newsletter format.
        - Automate the design and formatting of the newsletter using email marketing software.
        - Implement a scheduled distribution process that sends the newsletter to subscribers.
- **EMAIL MANAGEMENT TOOL**
    - After careful investigation and evaluation of multiple email management tools, the proposed tool for GSF is MailerLite (www.mailerlite.com)
        - User-friendly drag-and-drop editor
        - Template creation
        - Simple preview feature
        - Time zone scheduling
        - Automation workflows
        - Signup forms and pop-ups
        - Email verification
        - Subscriber segmentation
        - A/B testing
        - Real-Time analytics
        - Integration with other marketing and CRM platforms
        - Compliance and Deliverability
        - Website and blog creation tools
        - Landing page creation
        - Customer support
        - Affordable pricing

- **Benefits to GSF association members:**
    - Timely and Relevant Updates: Subscribers will receive up-to-date information, ensuring they stay informed about the latest developments, events, and resources within the GSF community.
    - Efficiency: GSF's streamlined e-mail creation and distribution process means that members receive newsletters efficiently, without delays caused by manual content collection and formatting.
    - Enhanced Engagement: The new strategy leverages and engaging content from GSF's social media channels, increasing member engagement with fresh and appealing content.
    - Consistency: Subscribers can count on a consistent flow of high-quality content in each newsletter, reinforcing the value of their association membership.
    - Access to Evergreen Resources: The newsletters include links to evergreen resources on GSF's website, allowing members to explore valuable content at their convenience.
    - Measurable Impact: GSF's ability to track engagement means we can report the impact to

member associations, helping them make informed decisions about their involvement with GSF.

- **Potential concerns of this proposal:**
  - Overreliance on Existing Content: Depending on website and social media content for newsletters requires that these sources are up-to-date.
  - Subscriber Engagement: While the strategy aims to enhance engagement, there's no guarantee that all subscribers will actively engage with the content. Some members may still prefer other communication channels or may not regularly check their email.
  - Email Deliverability: Ensuring that newsletters reach subscribers' inboxes and avoid spam filters is critical.
  - Privacy and Data Security: Any data breaches or mishandling of subscriber data could lead to trust issues.
  - Feature Limitations: The suggested tool is a basic email-management marketing tool.
  - Technical Challenges: Like with any tool there may be technical challenges, such as formatting issues or disruptions in the content flow.
  - Resources: Implementing this new strategy requires buy-in from all stakeholders.
  - Human Errors: There is always a possibility of factual inaccuracies, link errors or typographical errors.

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