

MEMO# 9124

August 5, 1997

FALL MEETING SCHEDULED FOR SEPTEMBER 12-13, 1997, IN SCOTTSDALE

[9124] August 5, 1997 TO: CONTINUING EDUCATION AND TRAINING ADVISORY COMMITTEE
No. 7-97 OPERATIONS COMMITTEE No. 26-97 RE: FALL MEETING SCHEDULED FOR
SEPTEMBER 12-13, 1997, IN SCOTTSDALE

As we previously informed you, the fall meeting of the Institutes Continuing Education and Training Advisory Committee will be held September 12-13, 1997, at the Resort Suites in Scottsdale, AZ. Attached is an agenda for the meeting, which will consist of a business session, task force meetings, a committee dinner, breakfast discussion groups, and a half-day seminar. The business session will feature a report on the status of the Securities Industry Continuing Education Program; task force reports; member presentations; and "Shop Talk" (a general discussion session in which you may raise topics to discuss with rest of the committee). Please come prepared with any topics you feel would be of interest to the group. As has been our tradition, there will be a committee dinner on Friday evening. This is an optional event, and no program or presentations are planned. On Saturday, September 13th, Allison Rossett (a well-known author and expert on instructional design and technology) will present a half-day seminar on training needs analysis. Dr. Rossett will describe how to conduct a good training needs assessment, and offer ideas on using the results of the analysis in developing a training plan. As you may know, Dr. Rossett is Professor of Educational Technology at San Diego State University. A well-known speaker and consultant, she is the author of several books on instructional design topics. She also has served as an editor of Performance and Instruction and the Journal of Instructional Development. As has been the case in the past, there is no charge to attend the business meeting, task force meetings, breakfast discussion groups or the buffet lunch. However, to help defray costs, there will be a \$50 per person dinner registration fee and a \$100 registration fee to attend the seminar by Allison Rossett. If you are planning to attend any of these events, please complete and return the attached registration form to Erin George at the Institute by August 29, 1997. Please enclose a check (payable to the Investment Company Institute) for any applicable fees. Attendance at committee events will be limited to members of the Continuing Education and Training Advisory Committee (or their substitutes) and the Operations Committee. Each member may bring one spouse or guest to the committee dinner on September 12th. Casual attire is appropriate for all advisory committee events. For your convenience, the Institute has reserved a block of rooms at the Resort Suites of Scottsdale, which is located at 7677 East Princess Boulevard in Scottsdale. The hotel is directly across the parking lot from the Scottsdale Princess Hotel. The special rate is \$155 per night for a one-bedroom suite. To take advantage of this room rate, please

follow the directions on the attached hotel room reservation form, and return it to the hotel by August 8, 1997. When making your hotel reservations, you might want to consider staying for the Institutes annual Operations Conference and Vendor Exhibition, which will be held September 14-17, 1997, at the Scottsdale Princess Hotel. The theme for this years conference is " No More Boundaries: Real-Time Demands of the Global Marketplace." For your information, a preliminary program for the conference is attached. If you have any questions regarding the Continuing Education and Training Advisory Committee meeting, please call Erin George at 202/326-5868. Please direct questions regarding the Operations Conference to the Institutes Conference Division staff at 202/326-5968. We look forward to seeing you next month. Stephanie Brown Assistant Vice President, Training and Marketing Attachments

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