



SCA Events Site Criteria Ad Hoc Committee

A Whitepaper Describing Our Work and Solution

Thank you

Thank you for your interest in learning more about the SCA 2018 Ad Hoc Committees, formed at the direction of the SCA Board to improve our processes and ensure inclusiveness in the SCA community.

Background

SCA discovered gaps in our processes related to selecting sites for SCA activities, such as events and competitions, and as a result of these gaps, SCA's actions have alienated some members. SCA places a high priority on our commitment to living our values and the SCA Board of Directors directed the formation of two ad hoc committees dedicated to correcting the gaps in our processes. This whitepaper describes the problem faced by the "Event Site Criteria" ad hoc committee (ESC), the process for addressing it, and the solution.

The ad hoc committees were empowered to make decisions with ongoing consultation of a broader range of members during the process. The goal of these ad hoc committees was for as much involvement from the specialty coffee community as possible at many stages along the way.

The purpose of ad hoc committees in any organization is to address a specific, one-time need through empowered representation of stakeholder groups that deliberate and arrive at decisions. As with all ad hoc committees, the ESC has prepared a set of recommendations it was formed to produce, so with acceptance of these items, the committee plans to disband. Upon presentation of this work, the responsibility for ongoing activity related to this project is transferred to the SCA Equity, Diversity, and Inclusion (ED&I) Task Force of SCA Advocacy.

Committee Members

<https://sca.coffee/about/ad-hoc-committees/>



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Introduction

SCA produces many types of events and the scope of each event type is different. Using our Values and guidance from third-party resources, ESC developed a set of best practices and their priority relative to one another, that SCA events staff and other leadership should use when considering sites for future events. ESC fully recognizes that we live in an imperfect world, and that making decisions about viability of future sites must be able to be flexible enough to address competing values rather than establishing a bright “must not” line or other fixed limitation.

ESC members also recognized a clear distinction between SCA events that are “Compulsory” versus those that are not, such as an event specific to a window in time or requiring prior qualification, as these events are not substitutable for one another in the same way community events are. Compulsory events typically happen on an annual cycle with limited participation, which is a primary driver of their value. Therefore, sites that are associated with Compulsory Events are held to a different standard than those events that are optional to attend or substitutable for one another throughout the year or from year to year (examples: networking events, educational events, etc.)

This solution sets priorities among many qualities that are important to stakeholders. Use of this information could feed into multiple applications, such as incorporating into future Requests for Proposals (RFPs) or identifying opportunities with new events. Future adaptations could include smaller sub-sections of the content, provided the best practices and priorities as identified are maintained.



ESC sought direction from two primary third-party resources, the first, an international meeting-planning guide to best practices for designing requests for proposals (RFPs), and the second, a primer on the intersection of human rights and international businesses.

1. International Congress and Convention Association: International Association Meetings: Bidding and Decision-Making
2. United Nations and UN Human Rights Office of the High Commissioner: Guiding Principles on Business and Human Rights

Glossary of Terms

- Community/Local Event: events that refer to the members of a specific community or area as the main target audience.
- Compulsory Event: events that entail a single chance of achieving a specific objective. *i.e. I can only become the World Barista Champion if I attend the World Barista Championship.*
- Global Event: events that refer to the global community as target audience.
- SCA events staff: the Events Staff at SCA usually handle events logistical and financial planning of events, and are highly involved in the selection of a site.
- SCA Leadership Teams: the Leadership Team at SCA is in charge of ensuring SCA activities are in accordance with our strategic plan, budget, and values.
- Volunteer leaders: Volunteer Leaders donate their time, knowledge, and expertise in various scopes to support SCA events, and help the organization reach its goals.
- Centering: a practice used in mitigating conflict and other applications and is defined as Deliberate empathy with another's perspective, including active listening.

Structure Statement

To orient and align ourselves, the SCA Events Site Criteria Ad Hoc Committee (ESC) identified a need to clarify who SCA serves: companies or individuals? Through review of resources from global and US firms that specialize in best practices for associations, we arrived at a decision.

Research using credible sources revealed grouping associations into three types:

- **Trade** associations are established by individual industries for the sole purpose of allowing businesses in the same industry to connect to and benefit from one another. The member is a company/business.



- **Professional (or Individual)** Associations are established to further specific professions and the interests of those who work in them. Members are individuals within the profession who share a common belief or purpose.

Both of these descriptions could easily be applied to SCA. Fortunately, there is a third model, usually referred to as a “**hybrid**” or “combination” type association. One needs only to look at SCA’s membership structure to see that SCA is clearly a hybrid: organizations and individuals have avenues to join; ergo, SCA is a hybrid.

*Rather than finding an approach that blends the trade and individual models, success in the hybrid model depends on the association’s ability to produce **both sets** of benefits and opportunities of engagement. The hybrid model is not a blending of the two strategies, it is an imperative to deliver value to both fully.*

The **Hybrid** structure informed the development of two tools for use by SCA events staff or those making decisions on sites.



Input Tool 1: Criteria Chart

The intersection of the hybrid structure and the guidelines & best practices identified in the ICCA Bidding & Decision-Making document led to the development of a Criteria Chart for SCA Events.

The scope of the Ad Hoc committee did not include any consideration of logistical or financial imperatives of site criteria and selection, as these are already very well-defined by existing tools and decision-making processes. We recognize the need for these considerations to be maintained at the highest level of priority, with the recommendations put forward here designed to support and inform decision-making of sites that are already determined to be logistically and financially viable according to stated SCA metrics.

ESC recommends that every event type complete this chart once, with the possibility that some event types do not require completion of this chart for every iteration of the event. Publishing the chart for each event at least once is an opportunity to provide detail to SCA stakeholders, as well as transparency, with the stated purpose of each event and SCA members' ability to access this information. As our teachers used to say, "Show your work!" This chart gives us a chance to communicate our work. ESC recommends that the Criteria Chart be used for all future site selection for Compulsory Events.

SCA events staff may choose to share the Criteria Chart with potential bidders to promote transparency and to inform potential bidders more clearly on SCA's internal objectives and social-political commitments.

Please note: internal objectives and social-political commitments have been identified and ranked for importance using a normal distribution. The ranking system used ranges from 1 to 4 (see details below). In addition, some objectives/commitments have been considered critical for specific types of events. The term "site" is used for simplicity, but implies site, location, region, bid, or sponsor, both potential or confirmed.

Priority ranking system:

4: Most Important

3: Very Important

2: Important

1: Somewhat Important

This master chart represents the priority ranking of several important considerations against each other. There is a fundamental difference between event types and compulsory attendance. Therefore, for ease of use by staff, this master chart was further adapted into four separate tools to be used with the four different Event types, respectively:

- Community Events (e.g. CoLab, Camps, Retreats): All, except for G, Q, S, T, U.



- Community Events with Compulsory attendees (e.g. National Championships): All.
- Global Events (e.g. Trade Shows): All, except for M, O, U.
- Global Events with Compulsory attendees (e.g. World Championships): All.



SCA Event Site Criteria Chart

Internal Objectives and Social-Political Commitments	Urgency	Guidelines	Value for Global Coffee Community / Trade	Value for Individuals
<p>A</p> <p>Political/economic stability of destination perceived low or high risk.</p>	<p>Critical for any event with compulsory attendance</p>	<p>Evaluate current events that could include catastrophes, political instability, etc. Evaluate whether the risk is localized in event area, or where attendees are likely to travel through. May help to speak with locals, to evaluate impact on attendees. Site selection must comply with US Law. Consider providing additional support. If UNCLEAR:</p> <ol style="list-style-type: none"> 1. Consult with your supervisor 2. Review Values Document 3. Consult with ED&I task force 	<p>4</p>	<p>4</p>
<p>B</p> <p>Individual protection</p>	<p>Critical for any event with compulsory attendance</p>	<p>Please refer to UN Guiding Principles on Business and Human Rights for additional detail. Consider communities that may incur real or perceived threats. Consider the host’s stance on ensuring individual safety, especially for marginalized communities. Consider widespread health concerns or diseases. If UNCLEAR:</p> <ol style="list-style-type: none"> 1. Consult with your supervisor 2. Review Values Document 3. Consult with ED&I task force 	<p>4</p>	<p>4</p>



Internal Objectives and Social-Political Commitments	Urgency	Guidelines	Value for Global Coffee Community / Trade	Value for Individuals
C Exclusionist local laws or policies	Critical for any event with compulsory attendance	Considerations for marginalized communities with regard to exclusionist local laws or policies. Please refer to UN Guiding Principles on Business and Human Rights for additional detail. If UNCLEAR: 1. consult with your supervisor 2. review with Values Document 3. Consult with ED&I task force	3	4
D SCA Mission	Most Important	SCA Mission: “Engage, inspire, and expand a sustainable global specialty coffee trade through leadership in events, education, and research.” Consider mission of the hosting organization, initiatives in place, and affiliation/support to third parties.	4	4
E Impact on one or more SCA Strategic Themes: 1. Capacity Building 2. Member Engagement 3. Community Building 4. Education 5. Knowledge Building	Most Important	At least one (at least two for Compulsory Events) of the Themes must be present and reported under the Notes column.	4	4



Internal Objectives and Social-Political Commitments	Urgency	Guidelines	Value for Global Coffee Community / Trade	Value for Individuals
6. Leadership Development				
7. Strengthen Supply				
F Anticipates or meet needs of key sponsors or other business partners	Most Important	Consider location, and partners needs.	4	2
G Supports SCA Hybrid business model	Very Important	Does location serve the needs of trade members through business opportunities, and individual members who are seeking professional growth? Consider mission of the hosting organization, purpose of the event, and initiatives in place.	3	3
H Growth potential	Very Important	The event helps communities, companies, and the association to grow--both financially and in terms of membership. Consider event goals, initiatives in place, and communities' engagement.	3	3
I Fosters a new generation of diverse, empowered, and capable coffee leaders	Very Important	Consider communities' engagement.	3	3
J Diversity and Inclusion	Very Important	If not clear, use of Values Document is required.	3	3
K Strength of local team	Very Important	Local team includes members and/or suppliers.	3	2
L Link to SCA's or the coffee industry's culture and history.	Very Important	Consider mission, and history of the hosting organization.	2	3



	Internal Objectives and Social-Political Commitments	Urgency	Guidelines	Value for Global Coffee Community / Trade	Value for Individuals
M	New location	Very Important	Association has never before met in the city or region.	2	3
N	Brand new venue or “hot” new destination.	Important		2	2
O	Strong local expertise and availability of local speakers, sponsors, and volunteers.	Important	A larger consideration for local events, and not global, except in the case of budget concerns to bring in speakers.	2	2
P	Support for bidder facing particularly strong challenges.	Important	<p>This could have a positive or negative influence on the decision making process, depending on the type of event, and the challenge in the area.</p> <p>Consider the positive influence on a local community that is challenged. In the case of global events, there is a balance between: Can we do good here; Will we overtax the community; is the global community safe?</p> <p>Also consider issues of accessibility or impact on attendees.</p>	2	2
Q	Bidders are active members of the association	Important	This could include regular attendees of previous meetings; sponsors; speakers; etc. However, SCA should also be open to new associations and partners, particularly in the case of local events.	2	2
R	Popular bidder	Important	This could include engaged member or community figure. Ensure no conflict of interest.	2	2
S	Sympathy and/or respect for bidder or destination that has previously bid and lost.	Important		2	1



	Internal Objectives and Social-Political Commitments	Urgency	Guidelines	Value for Global Coffee Community / Trade	Value for Individuals
T	Link to important major public event	Somewhat Important	This could include events like the Olympics, Expo, Arts Festivals, etc. Consider positive and negative effects.	1	1
U	Response to pressure from similar service providers	Somewhat Important	In cases where there is a competitive event, consider the positives and negatives to providing events in the same location, or timeline.	1	1



Input Tool 2: Values Chart

SCA's values statement is one of our most important assets: it helps SCA and our members communicate what is important, and sets clear expectations about how SCA's staff and volunteer leaders make decisions. The SCA Values table is a tool designed to supplement the Criteria Chart. In some cases, the use of both documents is required (See rows A, B, and C of Criteria Chart above) though in most cases, the use of the Values tool is optional. If both are used, the Criteria Chart should be completed first.

ESC members recommend that SCA staff use the SCA Values in the following situations, though use of this table is not limited to this list:

1. If affirmation of A, B, or C of the criteria chart are not clear
2. As a "tie-breaker" between two RFPs or sites where it is difficult to determine a favorite between two or more relatively equal options
3. To provide context for why a site is suitable for SCA from a values and inclusivity perspective
4. For a new event type or a new market
5. To provide additional detail and transparency
6. In high stakes decisions

SCA events staff may choose to share the SCA Values table with potential bidders to promote transparency and to inform potential bidders more clearly of SCA's values.

Some components are bundled together, indicated by being shaded in pastel colors. Cells grouped together, shaded in color, should have at least one of the items met, but not all are required.



Example:

...provide a world-class event

...provide education

...conduct or deliver research

...develop or promote standards

At least one of four shaded blue should apply

Some components are red text. These items are required.

Example:

...prioritize mutual benefits of members and the overall SCA community

To use: first read each core value (column 1). In the second column, each component of the core value is listed as a measurable action and listed on one line. Review each line item, identifying any areas of note for a specific site in the “Notes” section. Site selection should prioritize sites that meet as many elements of our values as possible.



SCA Event Site Criteria – SCA Values

Section 1: SCA Core Values & Their Components

Target Audience (check one or both): Trade Individuals

In some cases, this simpler version can be used by event managers or others considering a site. It is much simpler to use, but does not provide as much detail. ESC recommends the event manager may use their best judgment as to which one to use.

SCA Core Values	Value Components: This will enable SCA to...	Notes
1. Relevant member value		
We serve our members as a non-profit global platform that: 1) provides world-class events, education, research, and standards; 2) promotes best practices and professionalism that are inclusive of and adaptive to context; and 3) amplifies voices within the specialty coffee value chain.	...provide a world-class event	At least one of four shaded blue
	...provide education	
	...conduct or deliver research	
	...develop or promote standards	
	...promote best practices	Either/or shaded yellow
	...promote professionalism	
	...be inclusive of and adaptive to context	
	...amplify voices within the specialty coffee value chain	
2. Sustainable Coffee Industry	...advocate for the sustainable growth of the coffee industry	
We advocate for the sustainable growth of the coffee industry through collaborative partnerships that pursue equity, prioritize	...collaborate or form partnerships	
	...pursue equity	



SCA Core Values	Value Components: This will enable SCA to...	Notes
<p>mutual benefits, and result in positive impact throughout the coffee supply chain. We work to improve understanding of critical social issues and inequities through proactive efforts, focused attention, education, and dedicated resources.</p>	...prioritize mutual benefits of members and the overall SCA community	
	...have a positive impact on the coffee supply chain	
	...improve our understanding of critical social issues and inequities	
	...be proactive	
	...focus our attention	
	...educate ourselves	
	...utilize dedicated resources wisely	
<p>3. Community of communities</p> <p>We value diverse perspectives by listening, centering¹, and adapting to unique local characteristics while encouraging a sense of global community for cultural and economic exchange. We recognize local communities and facilitate development of infrastructure, communication, and sharing within and among coffee communities.</p>	...value diverse perspectives	
	...listen	
	...promote centering ⁵	
	...adapt to unique local characteristics	
	...encourage a sense of global community	One of seven shaded green
	...promote cultural exchange	
	...recognize one or more local communities	

¹ *Centering* is a practice used in mitigating conflict and other applications and is defined as Deliberate empathy with another's perspective, including active listening.



SCA Core Values	Value Components: This will enable SCA to...	Notes
	...facilitate development of community infrastructure	
	...facilitate communication	
	...facilitate sharing within and among coffee communities	
<p>4. Best people</p> <p>We recognize that diverse perspectives are needed to have a well-balanced and dynamic representation of and for membership. This includes (but is not exclusive to) race, gender, age, nationality, sexual orientation, member category and career, as well as in intersections of these identities. We develop, empower, and retain the best volunteer leaders and staff to engage our membership and external audiences by fostering an informative, inclusive, rewarding, and mutually-supportive environment.</p>	...seek diverse perspectives	
	...engage members of diverse races or ethnicities	One of nine shaded pink
	...engage members of different genders including gender-nonconforming	
	...engage members of different ages or generations	
	...engage members of different cultural backgrounds, nations, or geographies	
	...engage members of different sexual orientation	
	...engage different member categories	
	...engage members of different positions in the coffee supply chain	
	...acknowledge intersectionality	
	...engage members of different identities other than those listed above	
	...develop volunteer leaders & staff	One of seven shaded grey
	...empower volunteer leaders & staff	
	...retain volunteer leaders & staff	



SCA Core Values	Value Components: This will enable SCA to...	Notes
	...engage external audiences (non-member, potential member, consumers, etc.). ...foster an informative environment ...foster an inclusive environment ...foster a rewarding environment ...foster a mutually-supportive environment	
5. Ethical operation We demonstrate integrity of business practice and non-profit governance. We comply with local regulatory requirements and act with unyielding dedication to our self-defined commitments. We inspire trust through transparent communication and acknowledgement of accountability, and improve performance through aspiration, self-monitoring and member engagement.	...demonstrate integrity of business practice ...demonstrate integrity of non-profit governance ...comply with local regulatory requirements ...act with unyielding dedication to our internal commitments (mission and strategies) ...communicate with transparency ...acknowledge accountability ...improve performance through aspiration, self-monitoring, or member engagement	
6. Respect for the individual We create, produce, and support discrimination-free and harassment-free safe spaces for personal and professional collaboration, growth, and learning. We recognize that membership benefits and participation in activities differ depending	...create or produce a discrimination-free and harassment-free safe space, or support an existing safe space ...amplify member voices ...promote collaboration ...promote growth	



SCA Core Values	Value Components: This will enable SCA to...	Notes
on identity, background, privilege and access to resources, and we acknowledge that every member has a voice.	...promote learning	



Section 2: SCA Core Values

SCA Core Values	Function of Values	Notes
Relevant member value	We serve our members as a non-profit global platform that: 1) provides world-class events, education, research, and standards; 2) promotes best practices and professionalism that are inclusive of and adaptive to context; and 3) amplifies voices within the specialty coffee value chain.	
Sustainable coffee industry	We advocate for the sustainable growth of the coffee industry through collaborative partnerships that pursue equity, prioritize mutual benefits, and result in positive impact throughout the coffee supply chain. We work to improve understanding of critical social issues and inequities through proactive efforts, focused attention, education, and dedicated resources.	
Community of communities	We value diverse perspectives by listening, centering ^g , and adapting to unique local characteristics while encouraging a sense of global community for cultural and economic exchange. We recognize local communities and facilitate development of infrastructure, communication, and sharing within and among coffee communities.	



SCA Core Values	Function of Values	Notes
Best people	<p>We recognize that diverse perspectives are needed to have a well-balanced and dynamic representation of and for membership. This includes (but is not exclusive to) race, gender, age, nationality, sexual orientation, member category and career, as well as in intersections of these identities. We develop, empower, and retain the best volunteer leaders and staff to engage our membership and external audiences by fostering an informative, inclusive, rewarding, and mutually supportive environment.</p>	
Ethical operation	<p>We demonstrate integrity of business practice and non-profit governance. We comply with local regulatory requirements and act with unyielding dedication to our self-defined commitments. We inspire trust through transparent communication and acknowledgement of accountability, and improve performance through aspiration, self-monitoring and member engagement.</p>	
Respect for the individual	<p>We create, produce, and support discrimination-free and harassment-free safe spaces for personal and professional collaboration, growth, and learning. We recognize that membership benefits and participation in activities differ depending on identity, background, privilege and access to resources, and we acknowledge that every member has a voice.</p>	



Additional Resources for Human Rights

The ESC believes that while it is important for SCA to consider competing values, the importance of human rights transcends all of our values and commitments. That said, as coffee professionals, none of us are prepared to offer definitive guidelines on how to maintain a strong human rights policy while supporting up and coming coffee frontiers, expecting that at some point, some sites under consideration may exist within regions or nations with questionable human rights records.

We recommend that SCA events staff become very familiar with a third-party resource we identified, which was developed by the United Nation Human Rights Office of the High Commissioner to assist organizations like SCA, specifically pages 16-22. We put forward this quote from this document as an appropriate summary of why and how this is important for SCA, from page 18:

“Where business enterprises have large numbers of entities in their value chains it may be unreasonably difficult to conduct due diligence for adverse human rights impacts across them all. If so, business enterprises should identify general areas where the risk of adverse human rights impacts is most significant, whether due to certain suppliers’ or clients’ operating context, the particular operations, products or services involved, or other relevant considerations, and prioritize these for human rights due diligence.”

Furthermore, we identify that it is unreasonable to expect that decision-makers have expertise in every region or nation of the world. We recommend that broad consideration be given to consulting local, engaged members when considering a new site, including collaborative engagement with local Foreign Affairs offices as needed.



Limitations / Recommendations for Further Work Within SCA Advocacy

- The objective of the ESC was to identify and prioritize best practices and commitments of SCA in the process of future site selection. Use of this information could be developed into different tools with multiple applications, such as incorporating into future RFPs or identifying opportunities with new events, though the content and the priorities established must be maintained.
- The scope did not include any consideration of logistical or financial imperatives of site criteria and selection, as these are already very well-defined by existing tools and decision-making processes.
- The ESC decided on use of the term “Marginalized Community” for the purposes of our documents. Further work is needed to clearly define “Marginalized Community” and/or adoption of another term to represent this concept.
- The Criteria Chart and Values table inputs should be reviewed at least annually.
- The SCA Values refer to “world class” events. This concept needs to be clarified.
- We recommend use of the UN document as a resource for decision-makers. Additional third-party resources should be identified.
- We recommend communication with Foreign Affairs offices in countries where prior familiarity is lacking, either through an engaged member in the region or directly, as appropriate.



Resources: SCA Structure

MCI Group (Switzerland/global. 60+ countries)

<http://live.mci-group.com/2017/11/latest-event-trends/>

ASAE & Associations Now (USA):

<https://associationsnow.com/2015/10/membership-memo-hybrid-model/>

<https://associationsnow.com/2016/10/question-folk-theories-membership/>

Marketing General Incorporated (MGI) (US/some global): Benchmarking Report:

<http://www.marketinggeneral.com/knowledge-bank/>

Resource: Criteria Chart

Please see pages 16-17 of the ICCA document (section 4.4) for more information on Socio-Political commitments. These criteria are the least likely to appear in most associations' bid manuals or guidelines, but experienced bidders know that their potential impact can be massive. Associations should at least be aware of their existence, knowing that these factors cannot be eliminated, but should be managed by prioritizing that which are most important and identifying any areas which may run counter to the objectives of the association.