INFORMS® SUBDIVISION MEETING HANDBOOK



JUNE 2018

CONTENTS

Welcome and Overview of INFORMS Subdivision Meetings 3

Subdivision Conference Proposal 4

Conference Chair/Committee Responsibilities 5

INFORMS Staff Responsibilities 5

Budget Development & Financial Tracking 6

INFORMS Meetings Department Fees for Services 7

Abstract Management and Program Development 7

Registration Services 8

Logistics Planning 8

Conference Promotion, Printing, and Branding 9

INFORMS Logo Guidelines 9

Exhibit and Sponsorship Support 13

Conference Material Production 13

Mobile App 13

Related Information from INFORMS Policies & Procedures Manual 13

Workshops at the INFORMS Annual Meeting 14

Sample Timeline/Key Dates 16

Sample Budget 18

Societies 21

Sections 21

Subdivision Meetings Proposal Form 22

WELCOME AND OVERVIEW OF INFORMS SUBDIVISION MEETINGS

This handbook has been designed to answer the most frequently asked questions regarding the approval process and administration of INFORMS-sponsored and co-sponsored conferences. The dedication and commitment of our volunteers is critical to the success of INFORMS. This handbook provides information and guidelines for Subdivision Chairs and conference organizers for planning conferences, workshops, and similar events. In particular, this outlines the guidelines and details the roles and responsibilities of Subdivision Chairs and INFORMS in the planning of subdivision-sponsored meetings.

INFORMS subdivision meetings offer your members and other interested professionals an excellent forum for sharing research, networking, and learning. They provide the opportunity to exchange information and discuss ideas and perspectives with colleagues, face-to-face. INFORMS encourages subdivisions to build stronger communities and promote their interest area through conferences and workshops. INFORMS also encourages subdivisions to partner with other subdivisions with overlapping areas of interest to develop conferences and workshops. Developing a combined subdivision conference allows for greater resources, a broader spectrum of information to be introduced, and is conducive to attracting larger audiences.

The INFORMS Meetings Department is responsible for the management of 3-4 core and topical conferences and 10-12 community/subdivision conferences each year. Their knowledge and experience are important assets to INFORMS and its subdivisions for organizing events, and you are encouraged to make use of this resource. In concert with other staff specialists and subcontractors, the INFORMS Meetings Department can utilize their expertise to guide you through all the steps of event planning. INFORMS Meetings Department can provide support for all conference logistics, or, if desired, provide support for some of the services required. Meetings Department staff can provide the following services:

- Site Selection & Lodging
- Timeline development
- Budget development & financial tracking
- Abstract management and program development
- Registration
- Logistics planning – space, catering, AV assistance
- Sponsorship Management
- Conference material production – name badges, signage, program printing
- Mobile App
- On-Site Support

These services are available at the rates outlined on page 7.

The following sections provide additional information on each aspect of conference planning. Note that while you may choose to enlist the help of the INFORMS Meetings Department in planning your conference, it is not mandatory, but it is encouraged because of the staff's extensive expertise in meeting planning. Keep in mind that even if you choose to organize the conference on your own, there are several essential rules that must be followed. These include the following:

- Adhering to the Policy and Procedure about scheduling conflicting events. Events must not be scheduled within two weeks of an INFORMS conference. Subdivisions must inform the Subdivisions Council VP and Meetings Department of any intended event dates prior to finalizing the dates.

- Proposals for subdivision meetings must be submitted at least 12 months in advance of the anticipated dates of the meeting.
- Contracts such as hotel, transportation, catering, audio visual, and venue contracts must be reviewed, approved, and signed by INFORMS.
- The conference name and branding must follow INFORMS Policies and Procedures for logo usage and branding. (The Branding Guidelines are attached.) The Meetings Department can assist in ensuring proper usage.

SUBDIVISION CONFERENCE PROPOSAL

INFORMS-sponsored and co-sponsored events are highly regarded for their outstanding level of technical content. The conference approval process allows the VP of Subdivisions and the INFORMS Meetings Committee to maintain this high level of quality.

Use of the INFORMS Name with Conferences

For all sponsored and co-sponsored conferences, INFORMS must be part of the meeting title. Please refer to the Marketing and Branding section for additional information. Examples include:

- 2018 INFORMS Optimization Society Conference
- 2018 INFORMS Revenue Management and Pricing Section Conference

Submitting the Subdivision Meeting Proposal Form

The first step to secure approval is to complete and submit the Subdivision Meeting Proposal Form. This form should be completed by the General Chair and should be sent to the VP of Subdivisions and the Director of Meetings for approval.

The Subdivision Meeting Proposal Form requires basic information about the conference: proposed dates, location, program details, chair and program chair contact information, budget questions, and INFORMS support request.

Forms should be submitted 12 months prior to the proposed conference date. Having this information early helps to avoid overlap with other conferences and allows ample time for planning.

- Every subdivision or special interest group must inform the Subdivisions Council of all meetings where paid attendance is expected or if the meeting is designed for a national audience.
- The Chair of the Subdivisions Council will be responsible for communicating updates to the INFORMS Meetings calendar about all such events.
- The Subdivisions Council will consult with the Meetings Committee in all cases where the subdivision does not have meeting independence. If the subdivision is requesting INFORMS support or does not have sufficient funds to cover all downside risk, the subdivision must submit a budget for approval to the Meetings Committee.

Note: Proposals for non-subdivision meetings or subdivision meetings that are going to be co-located (pre- or post-) INFORMS Meetings should be submitted to the VP Meetings and/or the Director of Meetings for approval.

See Subdivision Meetings Proposal Form on Page 22.

CONFERENCE CHAIR/COMMITTEE RESPONSIBILITIES

The conference Chair manages the organizing committee and also oversees and directs the development of the educational program. Below are initial tasks the Chair must act on right away that are critical to the success of the meeting:

- Determine location of the meeting. Typically the subdivision would identify one or more locations of interest for the meeting. It is important to conduct a site visit of the potential venues/location where the conference may be held to see if the meeting venue and/or hotel meets the sleeping room and function space requirements of the meeting. The lead planner can conduct site visits with designated committee members or on their own. Any contract negotiation and signing should be taken care of so that an accurate budget can be created.
- The Chair of the subdivision meeting selects and confirms the organizing committee for the meeting.
- The Chair works with INFORMS Meetings Department to develop a conference budget and determine registration fees.
- Once formed, the Chair, along with the organizing committee, selects the topics for abstract submission.
- The next critical step is to convene with the organizing committee to discuss potential plenary and keynote speakers, and begin contacting and confirming them. This is particularly important because the plenary and keynote speakers create interest and enthusiasm and provide incentive to register for the meeting. The sooner the plenaries and keynotes are confirmed, the sooner INFORMS can market them.
- Committee calls. The Chair manages organizing committee participation by determining the frequency of committee conference calls and the topics for the calls.
- The Chair sets up regular meetings and sends invitations to the organizing committee. We have found using the collaboration tool Zoom for these meetings works well as it is easy to use, you can share screens and review documents as a group.
- The committee will need volunteers to assist with onsite registration and monitoring sessions. This entails checking in attendees, providing them with registration materials. INFORMS will mail materials to designated point of contact prior to the meeting.

INFORMS STAFF RESPONSIBILITIES

A Meetings Department staff person is assigned as the primary lead for the meeting. In this capacity they are the liaison between the Chair, committee members, and other INFORMS staff working on the meeting. Staff will participate in regularly scheduled committee conference calls, develop a working document to track sessions and speaker confirmations/rejections, and work closely with the Chair to facilitate action items.

Timeline Development/Key Dates

INFORMS Meetings Department can work with you to develop a timeline with key dates and responsibilities to you help stay on track with the planning. See sample timeline on page 16.

Meeting Dates, Site Selection, and Lodging

INFORMS has solid relationships with many hotels, hotel chains, and CVBs (Convention and Visitor Bureaus). The Meetings Department utilizes past experience, help from hotel global account representatives, and convention and visitor bureaus staff to research locations.

Contracts

First, prior to the issuance of any contract, the subdivision must check the INFORMS Conference Calendar to ensure that there are no conflicting meetings occurring within two weeks of the subdivision meeting. Second, the subdivision must inform the Director of Meetings of the intended meeting dates.

All contracts relating to the meeting should be sent to INFORMS staff to review, negotiate, approve and sign. INFORMS must be named in the contract as the responsible party. There will be a variety of contracts generated as a result of utilizing hotel rooms, meeting space, food and beverage, and function space, which should be sent directly to INFORMS meetings staff for the review process and signature.

There are some situations where INFORMS meetings staff cannot sign a meeting-related contract. Meetings often take place at academic institutions where a faculty member requests use of the internal space, catering, and audiovisual services run by the academic institution. In order to receive discount rates on these services, the faculty member is required to sign the contract. INFORMS Meetings Department staff will still need to review and approve the contract but will not sign the contract. INFORMS shall not be named in these contracts and language must be added to the contract stating that INFORMS is not the responsible party and has no liability under the contract. Individual committees may elect to organize room blocks on their own. However, in all cases, it is necessary to follow the INFORMS Policies and Procedures for selecting dates and signing contracts.

INFORMS Bylaw 5, Section 15 states:

"Neither the Institute nor the Institute Board by granting a charter to any subdivision, assumes any liability or responsibility for any obligations of any kind incurred by such subdivision unless prior written approval is obtained from the Institute Board. Any subdivision entering into a contract or written agreement must include in that contract or agreement language stating this limitation as designated by the Institute, unless prior written approval not to do so is obtained from the Institute Board."

BUDGET DEVELOPMENT & FINANCIAL TRACKING

INFORMS staff works with each subdivision to create a budget. This is a very important early step in the planning process. The budget will need to be approved by the INFORMS Meetings Department and the Subdivision Treasurer.

Financial reports can be provided during the planning phases of the meeting upon request.

- Preliminary (unaudited) budget with actuals is provided 60–90 days following the meeting.
- INFORMS Meetings Department works with the INFORMS Finance/Administration Department to process and reconcile accounts payable and receivable. INFORMS can advance payments to an organization with proper documentation to cover expenses before the meeting takes place.
- Organizers may pay out of pocket for small expenses (i.e., speaker gifts, printing, committee dinner, or office supplies), and request reimbursement from the meeting. INFORMS requires receipts for all expenses and accepts scanned copies or originals via mail. For those residing in the United States, a check will be issued. For those residing outside of the United States, or for larger amounts, a wire transfer can be offered.
- Honorariums or speaker expense reimbursements may be paid out of the meeting budget. If the committee is paying for multiple speakers it is best to provide a spreadsheet in advance or details on the budget with approved amounts. INFORMS requires receipts for all expenses and accepts scanned copies or originals via mail. For those residing in the United States, a check will be issued. For those residing outside of the United States, or for larger amounts, a wire transfer can be offered. A W9 (or W8 depending on residency status) is needed to send honorariums.

- The Subdivision will be the primary financial sponsor for the individual meetings. This does not require them to put forth any prepayments or deposits, but rather in the unlikely event of a financial shortfall, the Subdivision will cover the losses.
- Invoices for logistic services will be paid by INFORMS and charged back to the specific Subdivision.
- Sponsorships may be solicited and used to offset expenses. The organizing committee is responsible for soliciting sponsorships and providing deliverables. INFORMS will provide a sponsorship agreement and invoicing. All sponsorship dollars will be billed and paid to INFORMS so that they can be applied to the meeting.
- Surplus funds will be applied to the Subdivision. Meetings will not carry over a balance from year to year.

INFORMS MEETINGS DEPARTMENT FEES FOR SERVICES

Registration Processing	$10/registrant (active and cancelled)
Badges	$5/registrant
Credit Card Processing Fees	approximately 3% of attendee revenue
Abstract Processing (OASIS)	$20/abstract submitted
Meetings Management Labor	$2,500–$5,000 for smaller meetings (up to 200 ppl.)
Mobile App	starting at $5,000

All meetings are charged the actual fees and are reconciled approximately 60–90 days following the meeting.

Please note that Registration Services do not include INFORMS personnel traveling onsite to the meeting. If onsite staff by INFORMS meetings staff is required to assist with registration and/or logistics support, all direct costs (labor, airfare, ground transportation, lodging, per diem, and incidentals) will be charged to the meeting.

See sample budget on page 18.

ABSTRACT MANAGEMENT AND PROGRAM DEVELOPMENT

The Conference Chair and Committee are ultimately responsible for the content of the meeting. This includes, but is not limited to, managing the call for speakers, inviting speakers including keynote or plenary speakers, confirming speakers, setting up and finalizing the flow of the agenda.

INFORMS utilizes OASIS, one of the industry's leading abstract management solutions. OASIS provides end-to-end meeting processes including submission, abstract/paper review, session building, notifications, itinerary builder, system integration, and publications. INFORMS strongly recommends abstract submission through Oasis for subdivision meetings.

Program Chairs and other committee members work directly with the Manager, Program Development to identify the topics for the meeting and a submission page is created. This process should be started 7 months (minimum) before the meeting.

It is beneficial for subdivisions to use OASIS so only one abstract management system is used for all INFORMS Meetings. OASIS can help increase your efficiency by automating content collection, review, and session scheduling, and by providing tools to communicate and easily collect data across all meeting content contributors. OASIS integrates with INFORMS registration system, Association Anywhere (AA).

The biggest challenge with abstract submission is ensuring adherence to the deadlines for submission. Abstract submission and session allocation is driven by a start date and end date. After the end date, once the system is closed, any additional abstracts must be manually entered by INFORMS staff. Delayed abstract submission results in delaying other activities that must be in place in order to move forward.

REGISTRATION SERVICES

INFORMS provides registration services through the self-service portal in Association Anywhere (AA). INFORMS members are familiar with this system as it is the same system used for membership and other meetings.

The registration services enable attendees to register online using a secure website, or by mail or telephone. Our customer service department will instantaneously process, authorize, and charge online credit card transactions. In addition, auto-generated confirmation emails are sent directly from the system.

INFORMS provides individualized customer service, answering registrants' questions, and assisting with special requests.

Registration reports can be provided to the Conference Chair or designated individual on an agreed upon schedule.

Registration services also include: name badges, lanyards, and email communications to registered attendees. Conference ribbons and branded giveaways can also be coordinated and ordered through our department. Typically these materials are mailed directly to the Conference Chair for distribution at the meeting. INFORMS Registration Services does not include INFORMS personnel traveling onsite to the meeting. If onsite registration personnel are requested, all direct costs (labor, airfare, ground transportation, lodging, per diem, and incidentals) are charged to the meeting.

LOGISTICS PLANNING

The logistics for smaller subdivision meetings are fairly basic and are oftentimes handled by the Conference Chair and organizing committee. However, for larger subdivision meetings, we understand that the details can be overwhelming and encourage you to engage the services of the Meetings Department staff. INFORMS meeting planners can work with the committee to fully understand the requirements for meeting space, room set-up, audio-visual, and food and beverage. Services include, but are not limited to, the following:

- Suggestions and advice from previous INFORMS conferences and best practices
- Providing new ideas to enhance the meeting experience for all stakeholders such as alternate room set-ups and catering suggestions
- Creating detailed specifications for the hotel or conference center (space map, room sets, audio-visual, food and beverage)
- Reviewing, updating, and approving Banquet Event Orders (BEOs). Managing food and beverage guarantees to manage costs.
- Developing and creating signage

Logistics Planning does not include INFORMS personnel traveling on-site to the meeting. If on-site personnel are requested all direct costs (labor, airfare, ground transportation, lodging, per diem, and incidentals) are charged to the meeting.

CONFERENCE PROMOTION, PRINTING, AND BRANDING

Conference Promotion

Subdivisions are responsible for promoting their call for papers in INFORMS Connect, through email, and social networking. INFORMS will include the meeting on our Meetings Calendar.

Printing Services

INFORMS will provide printing services such as name badges, programs, fliers, and signs. All direct costs and shipping will be billed to the meeting.

Award Production

INFORMS has a preferred vendor for award production to include appreciation awards, best paper plaques, etc. INFORMS can also provide the conference committee with a template. All direct costs and shipping will be billed to the meeting.

INFORMS LOGO GUIDELINES

Overview

The INFORMS logo was redesigned and adopted by the INFORMS Board of Directors in 2017. Policies & Procedures 2.9 states, "INFORMS wishes to avoid confusion and achieve a unified image; this requires a set of consistent procedures for the use of its logo and acronym. The INFORMS logo is to be used across all products and sub-brands."

The INFORMS logo embodies the strength and energy of our organization and its members, and the consistent and frequent use of the logo across all of its products and sub-brands will help to bring INFORMS and its strategic goals to the forefront of the public's perception of operations research and advanced analytics.

Usage

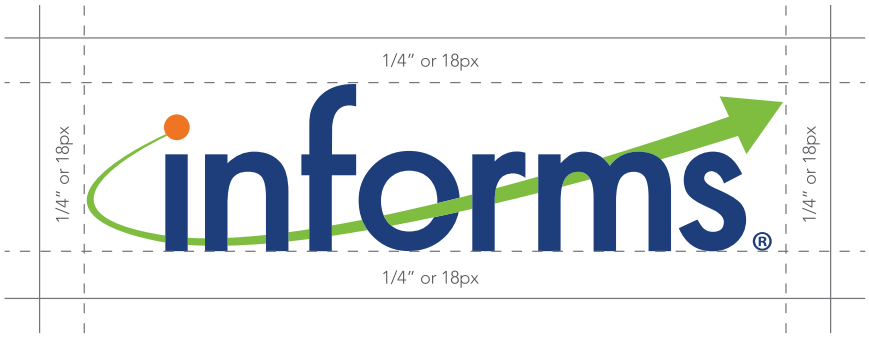
The INFORMS logo must be present on all items produced by and for INFORMS products and its sub-brands. This includes items such as printed collateral, promo pieces, sponsorship, promo items, and environmental graphics at INFORMS events. Always include the registration mark when using the INFORMS logo (see below).





Scaling

The minimum size requirement for the INFORMS logo is 1" or 72 pixels wide, and the safe space around the logo needs to have a clearance of at least 1/4" or 18 px on all sides. Otherwise, the logo becomes difficult to read when further size reductions are made. Always size the logo proportionally, do not stretch or slant. Always use the logo as 300 dpi for print materials—web logos that are 72dpi are not suitable for printing.



Logo Colors

The logo will appear in PMS 287 (blue), 158 (orange), and 376 (green), or their CMYK or RGB equivalents; grayscale; black, or white; no other colors may be used. However, in a one-color printing situation, the one-color version maybe printed in the specified color.

Logo Effects

No graphic treatments should be used, such as beveled edges, shadows, highlights, or other treatments/effects. Do not use the logo with a patterned background. Do not use gradients or screens for the logo. When creating web or print materials do not use the INFORMS logo as a wallpaper treatment or patterned background.



Typography

Maintaining consistent typography in all INFORMS communications ensures a visual continuity and optimal impact. The typefaces pictured here have been carefully selected to best represent INFORMS. Please exercise the same care in selecting typefaces, as you would when choosing any other branding device. Avenir is the primary typeface that is used throughout all INFORMS branding material.

Avenir Heavy

Main Header Use Only

Aa

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

a b c d e f g h i j k l m n o p q r s t u v w x y z

1 2 3 4 5 6 7 8 9

Avenir Medium

Sub Header Use Only

Aa

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

a b c d e f g h i j k l m n o p q r s t u v w x y z

1 2 3 4 5 6 7 8 9

Avenir Light

Body Text Use Only

Aa

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

a b c d e f g h i j k l m n o p q r s t u v w x y z

1 2 3 4 5 6 7 8 9

Sub-Brands

To both build INFORMS brand equity and have the sub-brands benefit from the main INFORMS brand, logos for INFORMS sub-brands – Subdivisions, Subdivision meetings, Career Center, Continuing Education, Communities, PubsOnLine, etc.) – shall consist of the INFORMS full color logo followed by the name of the sub-brand in PMS Cool Gray 9. This may be horizontal or vertical in orientation. They may include an icon that helps the viewer visualize the subject matter.

Horizontal Examples





Horizontal logos will be used as the primary logo for the group, including the header of their community website.

Vertical Examples





Vertical logos will be used as the secondary logo for the group, where horizontal space is small.

EXHIBIT AND SPONSORSHIP SUPPORT

INFORMS staff can provide support with exhibits and sponsorship for subdivision meetings. The subdivision is responsible for identifying potential exhibitors and sponsors and contacting them to gauge their interest in participating in the subdivision meeting. Alternatively, the subdivision can identify potential exhibitors and sponsors and pass the information on to the INFORMS staff who can then follow up with the company. INFORMS will manage incoming exhibitors and sponsors and process payments to ensure they are applied to the meeting. Typically for subdivision meetings, a designated person from the conference organizing committee would be in charge of exhibitors and sponsorships, including soliciting organizations, collecting logos for use on the website, conference program, and giveaway items, however, INFORMS can assist with this as well.

CONFERENCE MATERIAL PRODUCTION

INFORMS will design and print customized name badges for each registered conference participant. In addition, we can supply special event/drink tickets and ribbons.
INFORMS can also assist with the printed program. This assistance can be provided in several ways:

- If INFORMS handles the abstract process, a soft copy of the schedule and session abstracts can be provided to the conference organizing committee to be included in a program designed and printed by the committee.
- INFORMS can provide a full conference program to include a customized front and back cover, front matter, and abstracts. The direct cost for this service varies depending on the scope of the project.
- INFORMS can provide customized front and back cover and the subdivision would be responsible for having the program printed.
- INFORMS can provide branded signage for the conference. This includes standard-size signs as well as pull-up banners.
- The name badges, signage, and other materials will be shipped directly to the conference location.

MOBILE APP

When OASIS is used for abstract management and program development, INFORMS Meetings Department and the INFORMS IT Department can work together to develop comprehensive mobile apps for conferences. The mobile app can include conference branding, general attendee information, detailed schedule and program information, sponsor logos, maps of the venue, and more. For larger conferences this is a valuable asset to attendees. The mobile app is an add-on service that is available starting at $5,000.

RELATED INFORMATION FROM INFORMS POLICIES & PROCEDURES MANUAL

Subdivision Meetings (Section 15.2 Subdivision Policies & Procedures)

Every subdivision or special interest group must inform the Subdivisions Council of all meetings where paid attendance is expected to exceed 100 or where the meeting is designed for a national audience. The Chair of the Subdivisions Council will be responsible for updating the INFORMS calendar about all such events. The Subdivisions Council will consult with the Meetings Committee in all cases where the subdivision does not have meeting independence. If the subdivision is requesting INFORMS support or does not have sufficient funds to cover all downside risk, the subdivision must submit a budget for approval to the Meetings Committee.

The Meetings Committee will advise the Treasurer and Subdivisions Council of all such meetings. Meetings with a potential liability to INFORMS of more than $10,000 must have the approval of the Executive Committee.

Number 10.2.2 Policy on Alleviating INFORMS Meetings Conflicts

Effective: April 2007, Revised November 2014 Policy

In addition to the Annual, International, Analytics, and Topical meetings organized by INFORMS national, INFORMS subdivisions/communities organize meetings targeted primarily to their members. In order to ensure robust participation in all INFORMS events, it is important that the timing of INFORMS meetings do not conflict with one another. This policy seeks to minimize conflict among all INFORMS meetings through informed decisions.

INFORMS subdivisions/communities may not schedule meetings in direct conflict with an INFORMS meeting (Annual, International, Analytics, or Topical Meetings). A direct conflict occurs when a subdivision/community meeting is within a two-week window of an INFORMS meeting (i.e., any portion of the subdivision/community meeting occurs in the interval between two weeks prior to the start of the INFORMS meeting, and two weeks after the end of the INFORMS meeting). Exceptions to this requirement may be granted by the Meetings Committee.

Subdivisions face competing goals and conflicts, often in their efforts to serve as interfaces between INFORMS and other societies. INFORMS will help subdivisions make good scheduling decisions by providing a central online calendar for all meetings organized by INFORMS and its subdivisions. INFORMS and the subdivisions should all participate in this process by providing information on future conferences as soon as these are scheduled so that all decisions can be made with a full understanding of any conflicts that may arise. To alleviate timing conflicts among INFORMS national and subdivision meetings, all INFORMS meeting organizers should follow this process:

- *All INFORMS meeting organizers should consult the INFORMS calendar to determine the dates of other INFORMS meetings prior to selecting dates for their meeting. This should be done for all meetings independent of whether the meeting will be utilizing INFORMS office resources or not.*
- *The date for a proposed meeting should be reported to the INFORMS Meetings Department as soon as it is proposed, and if possible at least 12 months in advance of the proposed meeting. Best efforts should be made to avoid conflicts with other meetings that have overlapping interests. Should conflicts occur the Meetings Department will bring it to the attention of the Meetings Committee.*
- *For the protection of meeting organizers, all contracts and agreements must be reviewed by the INFORMS Director of Meetings and signed by the Executive Director.*
- *Meeting organizers should confirm with INFORMS Meetings Department to have their event added to the conference calendar. This calendar is available online at http://www.informs.org/Attend-a-Conference/Conference-Calendar.*

WORKSHOPS AT THE INFORMS ANNUAL MEETING

Number 10.2.4 Workshops at the Annual Meeting (Effective: April 2009, amended November 2014 Policy)

Basic Requirements

- *A workshop cannot compete with the INFORMS Annual Meeting; it must be held before or after the Meeting.*
- *Workshops must be a minimum of 2 hours.*
- *Workshops registrants and speakers must register for the Annual Meeting.*
- *For registration, workshops will appear as an add-on option on the Annual Meeting registration forms. Registration processing will be handled by INFORMS staff.*
- *The number of workshop opportunities at an Annual Meeting will be determined by the available space and time.*
- *Organizers must submit a proposal to the Meetings Committee through the Director of Meetings with*

the following: organizer background; topic and outline of workshop content; budget with attendance projections. Proposal deadline: seven months prior to the meeting. Organizers will be notified of acceptance within 15 days.

» *The INFORMS Meetings Committee has authority to approve or disapprove requests and will evaluate all proposals relative to their added value to meeting attendees.*

Who can organize a workshop?

» INFORMS subdivisions

» Companies in the O.R. product field – publishers, software vendors, consulting services – that are exhibiting at the Annual Meeting

» Other entities in the O.R. field (universities, professors, nonprofit initiatives in the field such as COIN)

Financial Requirements

» The workshop must be cost neutral to INFORMS, including staff time.

» The workshop fees will be determined in conjunction with the budget.

» Typical costs include: registration services through INFORMS staff, materials, AV, food & beverage (if offered).

» Workshop rooms will be provided free if space is available (as part of the INFORMS facility contract).

» Registration must be handled by INFORMS staff. INFORMS staff can also provide assistance with logistical planning, management, and marketing. Workshop organizers will be required to pay a fee to cover INFORMS services. The fee amount will be developed by the INFORMS Director of Meetings. Workshop organizers will be required to agree to the fee as part of workshop planning.

» INFORMS reserves the right to cancel the workshop if a mutually agreed upon minimum number of registrations are not received by a negotiated date.

Subdivision Independence (Section 15.2 Subdivision Policies & Procedures)

Three types of subdivision independence are formally recognized: journal independence, meeting independence, and financial independence. Within each of those areas, the appropriate INFORMS committee shall identify and specify the norms for independence and establish conditions under which it might waive the norms for independence and provide a subdivision with more independence in a specific arena.

A subdivision can request meeting independence from the Subdivisions Council by demonstrating a consistent record of meetings without losses, sufficient funds in the subdivision account, and established meeting organization structure. With meeting independence, the subdivision does not require approval from the Meetings Committee when less than $10,000 of INFORMS funds are at risk but must still inform the appropriate subdivision VP of such meetings.

SAMPLE TIMELINE / KEY DATES

TO-DO LIST	STAFF	COMMITTEE	TIMING
CHAIR & STAFF KICKOFF	X	X	14 mo.
If New Meeting, Chair & Staff Kickoff Should Take Place Earlier			18 mo.
COMMITTEE & CO-SPONSORS			
Determine Committee Structure		X	12 mo.
Set-Up Recurring Committee Meetings or Calls		X	12 mo.
Finalize Conference Budget		X	12 mo.
Invite Technical Co-Sponsors		X	12 mo.
Finalize Committee & Chair Assignments		X	12 mo.
PROGRAM			
Set Up Abstract Submission in System			7 mo.
Finalize Topics & Topic Keywords, Approve Template in OASIS	X	X	12 mo.
Confirm Keynotes and Plenaries		X	10 mo.
Open Submissions	X		8 mo.
Invite Cluster Chairs for Invited Clusters		X	8 mo.
Invite Cluster Chairs for Sponsored Clusters Through INFORMS Subdivisions	X	X	8 mo.
Monitor Abstract Submission, Invited Cluster Submission	X	X	8 mo.
Rolling Review of Submissions, Both Invited and Contributed	X	X	4 mo.
Close Submissions	X		4 mo.
Send Final Submission Data to Committee	X		3 mo.
Review of Submissions, Accept/Reject Decisions		X	3 mo.
Acceptance/Rejection Emails Out	X		3 mo.
Schedule Program	X	X	3 mo.
Schedule Entered into System, Cluster Chair Review	X		2 mo.
Program Schedule Online	X		2 mo.
Last Date for Changes by Authors, Communication by Staff	X		2 mo.
Pull Data from System for Production of Program Book/Front matter	X		1 mo.
Mobile App Info Dump (1st)	X		1 mo.
Post-Meeting Survey			
Book Printed and Shipped	X		2v3 wks.
WEB PAGE & MARKETING			
Logo Development		X	10 mo.
Website Design		X	
Collect Content		X	11 mo.

SAMPLE TIMELINE / KEY DATES (Continued)

TO-DO LIST	STAFF	COMMITTEE	TIMING
WEB PAGE & MARKETING (Continued)			
Develop Marketing and Communications Plan		X	9 mo.
Populate All Pages		X	9 mo.
Ongoing Changes and Additions		X	Ongoing
Produce Ads for *OR/MS Today*		X	Ongoing
Draft Articles for General Chair Byline for *OR/MS Today*, Review by Chair		X	Ongoing
Promotion Emails to Subdivision Listservs and Technical Co-Sponsors		X	Ongoing
EXHIBITS/SPONSORSHIP			
Exhibit Prospectus/Sales by Email	X		6 mo.
Exhibit Administration	X		Ongoing
Sponsorship Solicitation	X	X	12 mo.
REGISTRATION			
Set Up in System	X		10 mo.
Open Registration	X		9 mo.
Early Bird Cut-off Date	X		4 mo.
Monitor/Track	X		Ongoing
Onsite Management	X		Meeting
LOGISTICS/HOTEL			
Reserve Meeting Space at University and/or Hotel			14 mo.
Reserve Housing at Hotel and/or University			14 mo.
Obtain Hotel/Venue Contract			14 mo.
Finalize Hotel and Venue Contract	X		12 mo.
Determine Special Events or Enhancements Impacting Budget	X	X	12 mo.
Monitor Hotel Pickup	X		Ongoing
Food & Beverage, AV, Exhibit Logistics, Etc.	X	X	4 mo.
Hotel Room Block Cut-ff Date	X		4 weeks
On-site Management	X	X	Meeting

SAMPLE BUDGET STATEMENT

ATTENDANCE	TOTAL COUNT: 50	NOTES
MEETING ATTENDANCE		
Member Preregistration	25	
Member Late Registration	10	
Nonmember Preregistration	4	
Nonmember Late	2	
Student/Retired Preregistration	4	
Student/Retired Late Registration	2	
Complimentary	3	
Total Attendance	**50**	
REGISTRATION RATES		
Member Preregistration	$400	
Member Late Registration	$450	
Nonmember Preregistration	$475	
Nonmember Late	$525	
Student/Retired Preregistration	$150	
Student/Retired Late Registration	$180	
MEETING REVENUE		
REGISTRATION		
Member Preregistration	$10,000	
Member Late Registration	$4,500	
Nonmember Preregistration	$1,900	
Nonmember Late	$1,050	
Student/Retired Preregistration	$600	
Student/Retired Late Registration	$360	
Other/Guests	$500	
Misc.	$250	
Sponsorship	$1,500	
Total Meeting Revenue	**$20,660**	

SAMPLE BUDGET STATEMENT (Continued)

MEETING EXPENSES		
COMMITTEE		
General Chair		
Chair Expense, Awards	$500	
Speaker Travel, Honoraria	$1,000	
Committee Meetings	$150	
Total Committee	**$1,650**	
MEETINGS MANAGEMENT		
Meeting Management	$2,000	Site selection, contract, logistics
On-site staff person	$1,000	
Travel	$500	
Total Meeting Management	**$3,500**	
REGISTRATION		
Data Entry/Processing	$500	$10/person
Badges/Packets	$250	$5/person
Signs	$160	
Postage & Shipping	$75	
Conference Bags	$300	est. $6/person
Credit Card Bank Fees	$620	3% of revenue
Total Registration	**$1,905**	
PROGRAM & PROCEEDINGS		
Artwork-Program	$150	
Printing-Program	$300	
Abstract Processing	$1,000	$20 per abstract
Proceedings	$2,000	
Total Program	**$3,450**	
WEBSITE		
Design		Typically done by Subdivision
Total Marketing	**$0**	

SAMPLE BUDGET STATEMENT (Continued)

ARRANGEMENTS		
Food & Beverage		
Coffee Breaks	$750	
Breakfast	$1,950	
Lunch	$1,600	
Reception	$1,500	
Banquet	$3,000	
Total Food & Beverage	**$8,800**	
Facilities		
Room Rental	$500	
Total Facilities	**$500**	
Audiovisual Equipment		
Projectors, Microphones	$500	
AV Tech	$250	
Total Audiovisual Equipment	**$750**	
TOTAL ARRANGEMENTS	**$10,050**	
TOTAL EXPENSES	**$20,555**	
NET REVENUE/(EXPENSE)	**$105**	

SOCIETIES

INFORMS societies are the flagships of the INFORMS communities. The societies are significantly larger than the sections, chapters, or fora, and focus on a common theme. INFORMS Societies:

- Analytics
- Applied Probability
- Computing
- Decision Analysis
- Health Applications
- Information Systems
- MSOM
- Marketing Science (ISMS)
- Military Applications
- Optimization
- Simulation
- Transportation Science & Logistics

SECTIONS

INFORMS sections are technical interest groups devoted to advancing the professional interests of members in specialized and technical aspects of our profession. Sections are smaller, focused bodies of INFORMS that offer you the chance to meet and work with professionals who are interested in a specific area of operations research and management science. INFORMS Sections:

- Artificial Intelligence
- Auctions & Market Design
- Aviation Applications
- Behavioral Operations Management
- Data Mining
- eBusiness
- Energy, Natural Resources & the Environment
- Finance
- Group Decision & Negotiation
- Location Analysis
- Multiple Criteria Decision Making
- Organization Science
- The Practice Section
- Public Sector OR
- Quality, Statistics, and Reliability
- Railway Applications
- Revenue Management & Pricing
- Service Science
- Social Media Analytics
- SpORts
- Strategy Science
- Technology, Innovation Management and Entrepreneurship
- Telecommunications

I, _____ have read the Guidelines for Subdivision Meetings and agree to abide by the terms and conditions contained therein.

Name: _____ **Date:** _____

Signature:_____

SUBDIVISION MEETINGS PROPOSAL FORM

All proposals will be evaluated by the VP, Subdivisions and the INFORMS Director of Meetings.

Event

Name of Event: _____ **Date(s) of Event: (required)** _____

Are the above dates flexible? Yes ☐ No ☐ (If "No" please explain why?)

Organizers

The Conference Chair forms the organizing committee and serves as the primary contact between conference organizers and INFORMS.

Conference Chair (required)

First Name: _____ Last Name: _____

Affiliation: _____

Address 1: _____

Address 2: _____ City: _____

State/Zip: _____ Country: _____

Phone: _____ Email: _____

Program Chair (optional)

First Name: _____ Last Name: _____

Affiliation: _____ Email: _____

Additional Organizers: (optional)

Committee Structure: (required)

SUBDIVISION MEETINGS PROPOSAL FORM (Continued)

Location

City: _____ State/Zip: _____

Property Type (e.g. convention center, downtown hotel, university, etc.): _____

Do you require site selection assistance? _____

Program

Theme or Focus Concept: _____

Special Events/Activities: _____

Keynote Speakers: _____

Speaking Topics: _____

Will you need INFORMS Meetings Department assistance with the program through OASIS? Yes ☐ No ☐
If no, please explain how you will plan and organize the program agenda.

Budget

Is support being offered by a local institution? Yes ☐ No ☐

If yes, which institution? _____

Sponsorship and networking opportunities: _____

Additional Information

Please provide any other information you feel would be relevant to INFORMS when evaluating your proposal.