

COMMUNITY MEETING HANDBOOK



Updated July 2025

CONTENTS

Welcome and Overview of INFORMS Community Meetings 3

Societies 3

Sections 4

Community Event Proposal 5

Conference Chair/Committee Responsibilities 6

INFORMS Staff Responsibilities 7

Budget Development & Financial Tracking 8

INFORMS Meetings Department Fees for Services 9

Abstract Management and Program Development 10

Registration Services 10

Logistics Planning 11

Conference Promotion, Printing, and Branding 11

INFORMS Branding Guidelines 12

Exhibit and Sponsorship Support 12

Conference Material Production 12

Mobile App 13

Related Information from INFORMS Policies & Procedures Manual 13

Workshops at INFORMS Meetings 15

Refunds of Registration 16

Sample Timeline/Key Dates 17

Sample Budget 19

WELCOME & OVERVIEW OF INFORMS COMMUNITY 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. This handbook provides information and guidelines for Community Officers and conference organizers for planning conferences, workshops, and similar events.

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; it is encouraged because of the staff's extensive expertise in meeting planning. If an INFORMS community is organizing a conference or workshop without staff support, there are several essential rules that must still be followed. These include:

- Completing the **INFORMS Community Event Proposal Form** and awaiting confirmation from INFORMS Meetings Department before proceeding. Proposals must be submitted at least 12 months in advance of the anticipated dates of the meeting.
- Adhering to the Policy and Procedure about scheduling conflicting events. **Events must not be scheduled within two weeks of an INFORMS-level conference** (i.e., Annual Meeting, Analytics+ Conference, Healthcare Conference, Security Conference, or International Meeting)
- Contracts such as hotel, transportation, catering, audio visual, and venue, 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.)

SOCIETIES

INFORMS societies are the flagship of INFORMS communities. A society is significantly larger than the sections, chapters, or forums, and focus on a common theme. INFORMS Societies include:

• Analytics	• Health Applications	• Military & Security
• Applied Probablility	• Information Systems	• Optimization
• Computing	• Manufacturing & Service Operations Management (MSOM)	• Simulation
• Data Mining	• Marketing Science (ISMS)	• Transportation Science & Logistics
• Decision Analysis		

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 the chance to meet and work with professionals who are interested in a specific area of operations research and management science. INFORMS Sections include:

• Artificial Intelligence	• Group Decision & Negotiation	• Railway Applications
• Auctions & Market Desgin	• Location Analysis	• Revenue Management & Pricing
• Aviation Applications	• Multiple Criteria Decision Making	• Service Science
• Behavior Operations Management	• Organization Science	• Social Media Analytics
• Artificial Intelligence	• The Practice Section	• SpORts
• eBusiness	• Public and Societal Operations Research	• Strategy Science
• Energy, Natural Resources & the Environment	• Quality, Statistics, & Reliability	• Technology, Innovation Management & Entrepreneurship
• Finance		• Telecommunications & Network Analytics

COMMUNITY EVENT PROPOSAL

SUBMITTING THE INFORMS COMMUNITY EVENT PROPOSAL FORM

The first step to secure approval is to complete and submit **INFORMS Community Event Proposal Form**. This form should be completed by the Conference Chair and Community Officers.

The INFORMS Community Event Proposal Form requires basic information about the conference: proposed dates, location, program details, chair and program chair contact information, budget questions, and INFORMS support requests. The form will be reviewed by INFORMS Meetings Department and the Community Relations Coordinator and forwarded to the VP, Meetings and VP, Sections & Societies for approval. A sample budget may be required before the event is approved.

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.

Note: Proposals for Community meetings that are going to be co-located (pre- or post-) INFORMS Meetings (i.e., pre-INFORMS Annual Meeting workshops) should follow the same approval process.

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:

- 2025 INFORMS Conference on Quality, Statistics and Reliability (ICQSR)
- 11th INFORMS Transportation Science and Logistics Society Workshop

CONFERENCE CHAIR/COMMITTEE RESPONSIBILITIES

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

- **Determine Location of Meeting**
  Typically, the Community identifies one or more locations of interest for the meeting. It is important for the lead planner 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. Any contract negotiation and signing should be handled by INFORMS.
- **Conference Budget**
  The Chair works with INFORMS Meetings Department to develop a conference budget and determine registration fees. Budgets should be break-even or planned with a surplus. The budget should also be reviewed & approved by the Community Officers.
- **Program**
  The Chair of the Community meeting selects and confirms the organizing committee for the meeting. Once formed, the Chair, along with the organizing committee, selects the topics for abstract submission. The Committee may handle the abstract management and agenda coordination on their own (e.g., using Google Forms or EasyChair), or they may opt to use INFORMS abstract management system. If the INFORMS abstract management system is used, the committee must follow the timeline provided by INFORMS Meetings Department. The organizing committee is responsible for identifying, confirming, and communicating with any plenary or keynote speakers.
- **Committee Calls**
  The Chair manages organizing committee participation by determining the frequency of committee conference calls and topics for the calls. The Chair sets up regular meetings and sends invitations to the organizing committee. INFORMS staff may or may not participate in these planning meetings, depending on roles and responsibilities.
- **Website**
  The Committee is responsible for the creation and maintenance of a conference website. Communities may use INFORMS Connect or host the conference website on their university site.
- **On-site Support**
  The committee will need volunteers to assist with on-site registration and monitoring sessions. This entails checking in attendees, providing them with registration materials, etc. If requested, INFORMS will mail materials to designated points 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 conference or workshop. Staff will participate in regularly scheduled committee conference calls, as needed.

- **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 17**.
- **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 experience, help from hotel global account representatives, and CVB staff to research locations and help determine room blocks, if needed.
- **Contracts**
  Prior to the issuance of any contract, the Community MUST complete the **INFORMS Community Event Proposal Form** and get approval.

  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 could be a variety of contracts generated as a result of utilizing hotel rooms, meeting space, food & beverage, and function space. All contracts are reviewed and signed by INFORMS Executive Director.

  There are some situations in which INFORMS Meetings Department 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. 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 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 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."
- **Program**
  If the committee chooses to use INFORMS' abstract management system, a meeting would be organized with one of INFORMS Program Coordinators to identify keywords, session organization, and timelines. If INFORMS' abstract management system is used, staff can also work with the committee to develop a working document to track sessions and speaker confirmations/rejections and work closely with the Chair to facilitate action items.
- **Online Registration**
  Once attendee fees are agreed upon, INFORMS will set up online registration. INFORMS will provide committee with the registration page URL. Attendee reports will be sent on a regular basis.

BUDGET DEVELOPMENT & FINANCIAL TRACKING

INFORMS staff works with each Community 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 Community 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 provide payments to an organization with proper documentation to cover expenses before or after the meeting takes place. A W-9, W-8BEN, or W-8BEN-E (depending on residency status) is required for all vendors and individuals to be paid for goods, services, and labor.
- 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, All reimbursements will be issued via ACH (electronic payment); no checks will be mailed. For those residing outside of the United States 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 accept scanned copies or originals via mail. For those residing in the U.S., an ACH payment will be issued. For those residing outside of the U.S., a wire transfer can be offered. A W-9 or W-8BEN (depending on residency status), is required for all honorarium payments.
- The Community will be the primary financial sponsor for the individual meetings. This may require them to put forth prepayments or deposits. In the unlikely event of a financial shortfall, the Community will cover the losses. Surplus funds will be applied to the Community. Meetings will not carry over a balance from year to year.
- Sponsorships may be solicited and used to offset expenses. The organizing committee is responsible for soliciting sponsorships and providing deliverables. Sponsors should complete the **INFORMS Community Sponsor Form**. Once the form is submitted, INFORMS will invoice the organization. All sponsorship dollars will be billed and paid to INFORMS so that they can be applied to the meeting. The committee is responsible for the sponsorship deliverables and follow-up after the event.

INFORMS MEETINGS DEPARTMENT FEES FOR SERVICES

Registration Processing – $10/registrant (active and cancelled)

Badges – $5/registrant (printed and mailed to conference)

Credit Card Processing Fees – approximately 3% of all revenue

Abstract Processing – $20/abstract submitted

Meetings Management Labor – Approximately $2,500–$5,000

Mobile App – $5 per user (The mobile app can only be utilized if the abstract management/program development is organized through INFORMS.)

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 on-site to the meeting. If on-site staff by INFORMS 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 19**.

ABSTRACT MANAGEMENT & 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, and setting up and finalizing the flow of the agenda.

INFORMS currently utilizes Mira as our abstract management solution. Mira provides end-to-end meeting processes including submission, abstract/paper review, session building, notifications, itinerary builder, system integration, and publications.

Program chairs and other committee members work directly with an INFORMS Program Coordinator to identify the topics for the meeting and a submission page is created. This process should be started 7 months (minimum) before the meeting.

REGISTRATION SERVICES

INFORMS provides registration services through a self-service portal in our association management system (AMS). INFORMS members should be familiar with this system because it is the system used for membership and other INFORMS meetings.

The registration services enable attendees to register and pay online using a secure website. Autogenerated confirmation emails are sent directly from the system.

INFORMS provides individualized customer service to answer registrants' questions and assist with special requests.

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

If complimentary registrations are going to be utilized, they must be incorporated into the planning budget. INFORMS requires a spreadsheet of any participants receiving comp or discounted registrations to include full name, organization, email address, and mailing address.

Registration services also include printed name badges, lanyards, and email communications to registered attendees. Branded giveaways can also be coordinated and ordered through INFORMS Meetings 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 on-site to the meeting. If on-site 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 Community meetings are oftentimes handled by the Conference Chair and organizing committee. However, for larger Community meetings, we understand that the details can be overwhelming and encourage you to engage the services of the INFORMS Meetings Department. INFORMS meeting planners can work with the Committee to fully understand the requirements for meeting space, room set-up, audiovisual, and food and beverage. Services include, but are not limited to, the following:

- Suggestions, advice, and best practices from previous INFORMS conferences
- 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, audiovisual, 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 & BRANDING

Conference Promotion

Communities 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 can provide printing services such as name badges, programs, and signs, if budgeted for and deadlines are met. 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 BRANDING 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 its products and sub-brands helps bring INFORMS and its strategic goals to the forefront of the public's perception of operations research and advanced analytics.

Digital and print versions of community logos are available upon request.

For more information, please review **INFORMS Branding Guide**.

EXHIBIT AND SPONSORSHIP SUPPORT

INFORMS staff can provide support with exhibits and sponsorship for community meetings. The Community is responsible for identifying potential exhibitors and sponsors and contacting them to gauge their interest in participating in the community meeting. The Committee should request sponsors complete the **INFORMS Community Sponsor Form**.

INFORMS will manage incoming exhibitors and sponsors and process payments to ensure they are applied to the meeting. Typically, for community meetings, a designated person from the conference organizing committee would oversee exhibitors and sponsorships, including soliciting organizations, collecting logos for use on the website, conference program, and giveaway items. The community representative is responsible for following up with any sponsors or exhibitors that have a balance due.

CONFERENCE MATERIAL PRODUCTION

INFORMS can design and print customized name badges for each registered conference participant.

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 customized front and back cover, and the community would be responsible for having the program printed.
- INFORMS can provide branded 22 x 28 foam board signage for the conference.
- The name badges, signage, and other materials will be shipped directly to the conference location.

MOBILE APP

When Mira is used for abstract management and program development, INFORMS Meetings Department and the INFORMS IT Department work together to develop a comprehensive mobile app 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 an asset to attendees and can be used in lieu of a printed program or quick reference guide. The mobile app is an add-on service that is available for $5 per registrant.

RELATED INFORMATION FROM INFORMS POLICIES & PROCEDURES MANUAL

Subdivision Meetings (Section 15.2 Subdivision Policies & Procedures)

Every subdivision or special interest group must inform INFORMS staff of all conferences where paid attendance is expected to exceed 100 or where the conference is designed for a national or international audience. This does not apply to local events and established conferences that have already been managed through INFORMS staff. INFORMS staff will be responsible for facilitating review by the Vice President of Meetings and updating the INFORMS calendar if the event is approved. For all new subdivision conference requests, the INFORMS staff will notify the Subdivision VPs who will consult with the Vice President of Meetings. If the subdivision is requesting INFORMS professional meeting services, the subdivision must submit a budget for review by INFORMS staff.

INFORMS staff will advise the Treasurer and Subdivision VPs of all such conferences, as appropriate. Conferences 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; 2018 Summer Board Meeting; 2020 Summer Board Meeting; 2020 Fall Board Meeting; 2024 Fall Board Meeting

In addition to the Annual, International, Analytics, and Topical meetings organized by INFORMS, INFORMS subdivisions/communities organize meetings targeted primarily to their members. To ensure robust participation in all INFORMS events, it is important that the timings 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). Consideration should be given to whether INFORMS resources will be strained or there may be overlap in the target audiences which may negatively impact INFORMS. Exceptions to this requirement may be granted by the VP of Meetings.

Subdivisions face competing goals and conflicts, often in their efforts to serve as interfaces between INFORMS and other societies. INFORMS staff 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 to the meetings department staff 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 meetings and subdivision meetings, all INFORMS meeting organizers should follow this process:

- INFORMS Meetings Department will maintain an online viewable meetings calendar with the broadest possible listing of conferences in fields relevant to our mission. Subdivisions are encouraged to inform the Meetings Department of all known future conferences offered by sister societies that may be of interest to INFORMS members for posting on the calendar.
- 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. 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 and INFORMS, all contracts and agreements must be reviewed by the INFORMS Director of Meetings and approved and signed by the Executive Director.
- Meeting organizers must review the online calendar of meetings to be sure there isn't a conflict with another meeting. If there isn't a conflict, meeting organizers should contact Meetings Department staff and provide the conference information to be posted online. Meetings department staff will post the information.
- Here, a Workshop is defined to be a professional event organized by an INFORMS-affiliated entity (e.g., subdivision, special interest group, meeting exhibitor) held in conjunction with (immediately before or after and co-located in the same city with) an INFORMS meeting (Annual, International, Analytics, or Topical).
- While Workshops, as specified in Section 10.2.4, are allowed to be linked to an INFORMS meeting (Annual, International, Analytics, or Topical Meetings), no Workshop at any of the INFORMS meetings may overlap with the respective INFORMS meeting.

WORKSHOPS AT INFORMS MEETINGS

Effective: April 2009, amended November 2014; 2018 Summer Board Meeting; 2020 Summer Board Meeting; 2020 Fall Board Meeting; 2024 Fall Board Meeting

Basic Requirements

A workshop cannot compete with an INFORMS meeting (Annual, International, Analytics, or Topical Meetings); it must be held before or after the meeting.

- Workshops must be a minimum of 2 hours and expect a minimum of 25 participants.
- Workshops registrants and speakers must register for the respective INFORMS meeting. Exceptions may be granted by the VP of Meetings.
- For registration, workshops will appear as an add-on option on the respective INFORMS meeting registration form. Registration processing will be handled by INFORMS staff.
- The number of workshop opportunities at each INFORMS meeting will be determined by the available space and time.
- Organizers must submit a proposal to the VP of Meetings through the Director of Meetings with the following: organizer background; topic and outline of workshop content; budget with attendance projections. Proposal deadline: 7 months prior to the meeting.
- Organizers will be notified of acceptance within 15 days. However, the organizers need to agree with the fee to cover INFORMS staff services before they may proceed with the workshop.
- The INFORMS Meetings Committee has authority to approve or disapprove requests and will evaluate all proposals relative to their added value to meeting attendees.
- Business meetings, such as CIEADH, ACORD, Roundtable, Ambassador Program, Analytics Program Directors, are not considered to be workshops.

Who can organize a workshop?

- INFORMS subdivisions/communities
- Companies in INFORMS-related fields – publishers, software vendors, consulting services who are exhibiting at the affiliated INFORMS meeting
- Other entities in INFORMS-related fields (universities, professors, nonprofit initiatives in the field such as COIN-OR)

Financial Requirements

- The workshop must not cause a financial loss to INFORMS, including staff time.
- The workshop may be offered free or may charge a fee.
- Any costs, such as registration services through INFORMS staff, materials, AV, and food & beverage (if offered), must be assumed by the workshop organizer/sponsor.
- Workshop rooms on the day before, or on the day after the INFORMS meeting will be provided free of charge (as part of the INFORMS facility contract). A workshop running longer than one day, whether before or after the INFORMS meeting, will be charged an appropriate facility fee (whatever the INFORMS staff can negotiate).
- Registration for the workshop must be handled by INFORMS staff. INFORMS staff can also help 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.
- In the case of any net profit being realized, that profit will go to INFORMS. Exceptions include when the workshop is organized by an INFORMS subdivision/community. In that case, any net profit would go to the subdivision/community, as long as all costs (including INFORMS staff labor) are covered.

REFUNDS OF REGISTRATION

EFFECTIVE: APRIL 2009, amended November 2014; 2024 Fall Board Meeting

An INFORMS meeting registrant who requests a refund by the cancellation deadline will receive a refund of the registration fee less a processing charge. Refunds will not be allowed for cancellations made after the deadline.

Communities should refer to **Policies for INFORMS Meetings** for guidelines.

Sample Timeline/Key Dates	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 Mira	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/Frontmatter	X		1 mo.
Mobile App Info Dump (1st)	X		1 mo.
Post-Meeting Survey			
Book Printed and Shipped	X		2–3 wks.

Webpage & Marketing	Staff	Committee	Timing
Logo Development		X	10 mo.
Website Design		X	
Collect Content		X	11 mo.
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 & 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 Rate Cut-off Date	X		4 mo.
Monitor/Track	X		Ongoing
On-site 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-off Date	X		4 weeks
On-site Management	X	X	Meeting

Sample Budget			
ATTENDANCE		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**	

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	
	On-site staff person	$1,000	
	Travel	$500	
TOTAL MEETINGS MANAGEMENT		**$3,500**	
REGISTRATION			
	Data Entry/Processing	$500	
	Badges/Packets	$250	$5 per person
	Signs	$160	
	Postage & Shipping	$75	
	Conference Bags	$300	
	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		**$3,450**	
WEBSITE			
	Design		
TOTAL MARKETING		**$ —**	

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**	