

Section 9

Marketing, Communications and Outreach

NUMBER 9.1 VICE PRESIDENT OF MARKETING, COMMUNICATIONS, AND OUTREACH

Revised: Summer 2018; Fall 2023 Executive Committee

POLICY

The Vice-President of Marketing, Communications, and Outreach (VPMCO) serves as the INFORMS Board's primary liaison with the staff leader(s) assigned to the public affairs & marketing departments, and as a liaison to the National Science Foundation (NSF) and other government entities as appropriate.

The VP is responsible for supporting the strategic direction in these areas in conjunction with the staff leader(s) of the public affairs & marketing departments.

The staff is charged with developing and implementing short and long-term marketing, communications and advocacy programs and other related activities that help achieve INFORMS' strategic, financial, operational, and reputational goals and objectives. The VPMCO serves as an advocate for INFORMS and as a trusted O.R. and analytics subject matter expert. This individual should be able to be called upon to speak about INFORMS and technical subject matters with external audiences, including decision-makers in government and other organizations and businesses.

The VPMCO will also coordinate with the staff leader(s) of public affairs & marketing on communications with the government regarding O.R. and analytics issues and interests; communications with the O.R. and analytics community about relevant government information; and to arrange for NSF or other government representatives to participate in conference sessions and Board meetings.

The VPMCO is elected for a two-year term by the membership of INFORMS, normally in an INFORMS general election, according to the bylaws of the organization. Candidates for the position should have demonstrated experience serving as an O.R. and Analytics subject matter expert for both technical and non-technical audiences, including executive- level decision makers, along with active participation in other INFORMS activities and functions. Candidates are encouraged to have experience with, and current knowledge of, the NSF.

The VPMCO is responsible for nominating the chairs or members of the Committees described in Section 9 of the P&P and acting as a defacto committee member as required.

The Vice President may run unopposed for a second two-year term.

RELATED DOCUMENTS:

INFORMS Policies and Procedures Manual, Section 2.1 General Committee Procedures

Number 9.2 - U.S. Federal Research Engagement Committee

Revised: Summer 2025; Spring 2024; 2020 Summer; 2019 Winter

POLICY

The purpose of the INFORMS U.S. Federal Research Engagement Committee (FREC) is to strengthen communication and engagement between INFORMS and major U.S. federal research funding agencies—including but not limited to the National Science Foundation (NSF), the National Institutes of Health (NIH), the Department of Defense (DOD), the Department of Energy (DOE), and other mission-relevant agencies—on matters that impact the fields of operations research, analytics, data science, and related disciplines.

The Committee:

- Serves as a strategic conduit between INFORMS and key U.S. federal research funding agencies to advance mutual interests;
- Recommends qualified individuals for programmatic and advisory roles, including U.S. federal research funding agency program directors, division directors, and visiting or advisory committee members;
- Monitors and disseminates information on U.S. funding priorities, calls for proposals, and research initiatives;
- Facilitates the participation of U.S. federal agency representatives in INFORMS meetings and programming; and

Coordinates with the designated INFORMS staff liaison to support INFORMS' broader advocacy and public affairs efforts.

PROCEDURES

Committee Membership

The VPMCO will nominate a Chair of the FREC subject to the approval of the Board. The VPMCO is also eligible to serve as Chair. The Chair will serve a two-year term beginning January 1 with the ability to be reappointed for one additional term, subject to the Board approval. The Committee shall have a minimum of four individuals, including the Chair. The Chair shall recommend at least three additional committee members, also serving staggered two-year terms beginning January 1, subject to Executive Committee approval. Committee members may be reappointed for one additional term, subject to the Executive Committee approval. Committee members should have experience and current or recent knowledge of federal research funding agencies and programs relevant to the INFORMS community. Collectively, the Committee should represent a broad understanding of funding landscapes across science, engineering, healthcare, defense, and other relevant sectors. The INFORMS

Executive Director will designate a staff liaison to serve as an ex-officio representative from the INFORMS office.

Relation to the Board

The Committee reports to the Board through the VP MCO. Updates from this committee shall be included in the semi-annual reports submitted by the VP MCO to the board.

Meetings

It is expected the committee shall meet virtually throughout the year, as needed, with the requirement that they meet at least once per year.

Number 9.3 Pro Bono Analytics

Revised: Spring 2024; Summer 2018; Fall 2016

POLICY

The mission of the INFORMS Pro Bono Analytics program is to offer a platform for current and potential INFORMS members to volunteer their skills in underserved and developing communities in the U.S. and abroad. The program brings advanced analytics and operations research techniques to nonprofit organizations that may lack these skills internally and/or lack the resources to acquire these skills. The program also provides practical, real-world project experience to INFORMS members and other OR/analytics professionals, including experienced academics and practitioners as well as students and young professionals.

The VPMCO will choose a Chair of the Pro Bono Analytics Committee. The Committee shall consist of a chair and at least six additional members, all of whom are members of INFORMS. Members shall be appointed by the Committee Chair and confirmed to the Committee by approval of the Executive Committee. In the selection of members, efforts will be made to ensure representation of the breadth of INFORMS and members-at-large, industry and academic balance, and diversity of opinion, gender, age, race, and ethnicity. The normal term of membership is three years and Committee members will be appointed so that terms are staggered with the Chair's term, with terms beginning on January 1. The Committee Chair may serve no more than two consecutive terms. The committee will also include an ex-officio representative from the INFORMS office.

The Board liaison is the VPMCO. The committee will report at least annually on its activities and outcomes to the Board through the VPMCO.

RELATED DOCUMENTS:

INFORMS Policies and Procedures Manual, Section 2.1 General Committee Procedures
INFORMS Policies and Procedures Manual, Section 9.1 Vice President of Marketing, Communications and Outreach

Number 9.4 Career Service Committee: (formerly: Job Placement Committee)

Revised: Fall 2024; Fall 2024; Winter 2020: Changed Name; Summer 2020; (Note: Fall 2016: Moved from Membership to Marketing); Winter 1997

POLICY

The Career Services Committee supports strategic career development initiatives for job seekers and employers within INFORMS' fields of interest. The committee aims to offer strategic guidance to ensure applicants and employers are provided with a comprehensive and effective career services program, thereby enhancing INFORMS' visibility and leadership in its relevant fields.

PROCEDURES

Membership

The VPMCO shall nominate a Chair of the committee, with approval of the Board. The Chair will serve a two-year term beginning January 1. The Chair shall recommend at least two additional members, both university and industry/government representation, each with two-year terms beginning on January 1. Committee members will be appointed so that terms are staggered with the Chair's term. The committee members will be confirmed to the Committee by approval of the Executive Committee. The Chair may name interim members to the Committee in consultation with the VPMCO, but any such appointments must be affirmed by approval of the Executive Committee at its next regularly scheduled meeting. The Executive Director will designate a staff liaison to serve as an ex- officio representative from the INFORMS office.

Relation to the Board

The VPMCO is the Board Liaison to this committee. Reports will be submitted to the Board, as requested.

Functions: Duties and Responsibilities

Expected duties of the members of the career services committee may include:

- Contributing to the development of physical and virtual career fair content and tactics. Organizing industry/academic job panels and/or related content in conjunction with INFORMS meetings or events.
- Serving as or recruiting resume reviewers.
- Contributing to job seeker Career Center content.
- Supporting and advising on Career Coaching programs.
- Liaising with MIF, WORMS, the Diversity Committee, and others to remain informed on

leading inclusive career service practices and opportunities.

Meetings

The Career Services Committee will meet at least once per year.

Number 9.5 Advocacy Governance Committee

Revised: Spring 2024; Spring 2020

POLICY

The INFORMS Advocacy Governance Committee (AGC) provides strategic guidance, oversight, and counsel for the INFORMS advocacy efforts. These efforts aim to increase awareness and interest in INFORMS' fields of interests, to enhance the visibility and reputation of INFORMS among policymakers, and to grow membership engagement.

PROCEDURES

Committee Membership

The AGC shall consist of at least five INFORMS members, who may be nominated by another INFORMS members or who may self-nominate themselves. Prior engagement with policymakers is preferred but not required. The Chair shall select the AGC members in consultation with the VPMCO (Vice-President Marketing, Communications & Outreach) and staff liaison and with sensitivity to its diversity (e.g. representation of different research areas, types of institutions, organizations, membership categories, and race, ethnicity, gender, etc.). The Chair of the NSF Liaison Committee shall serve as an ex-officio member of the AGC. The Chair shall be nominated by the VPMCO and approved by the INFORMS Board of Directors. The Executive Committee shall approve all other members.

AGC chairs serve a two-year term beginning January 1 of even-numbered calendar years. Committee members shall have staggered two-year terms expiring on December 31 of either odd- or even-numbered years. The Executive Director shall appoint a staff-liaison to serve as an ex-officio member of the AGC. No AGC member shall serve more than two consecutive terms, unless that person becomes Chair, in which case they shall serve no more than two consecutive terms in that capacity.

Relation to the Board

The AGC reports to the Board through the VPMCO. The AGC will report at least annually on its activities and outcomes to the board through the VPMCO.

The AGC will:

- review and provide oversight for the Advocacy program and budget;
- assist in creating opportunities for INFORMS members to communicate and interface with policymakers or to showcase the impact of such work within the INFORMS community;
- participate as appropriate in various policy-oriented briefings and events; and
- measure yearly progress against the measures and metrics established by the INFORMS Board of Directors for the advocacy effort to evaluate progress.

Meetings

The AGC will meet at least twice a year.

NUMBER 9.6 MAGAZINE EDITORIAL ADVISORY BOARD

Moved from Section 13- Publications to Section 9 - Marketing, Communications & Outreach, Summer 2024 Board meeting

Revised: Under Publications: Spring 2019; Summer 2019

POLICY

The Magazine Editorial Advisory Board is established to advise INFORMS on topics and trends in — and affecting — the profession of operations research, management science, and analytics for possible editorial coverage in the various magazine publication vehicles published by INFORMS. These vehicles include *ORMS Today*, *Analytics*, *Analytics eNews*, and *ORMS Tomorrow*.

PROCEDURES

Composition of the Editorial Advisory Board

The Magazine Editorial Advisory Board shall be composed of a chair, who will serve concurrently as a voting member of and liaison to the Publications Committee, and up to nine individual members as described below.

The vice president of publications in collaboration with the vice president of marketing, communications, and outreach selects the advisory board chair who will serve for a two- year term that can be renewed once. It is preferable that the chair be selected from members who have served previously on this advisory board. The members of the advisory board shall be nominated by the vice president of publications in consultation with the chair and appointed by the Board Executive Committee in December of each calendar year. In the selection of advisory board members, diversity of the advisory board will be reviewed, and nominations will be made with an effort to ensure the diversity of the advisory board as appropriate. All members of the advisory board must be members of INFORMS in good standing. At least 50% of the members of the advisory board should be from industry. Advisory board members shall serve two-year staggered terms, to provide an environment that fosters and encourages new perspectives and seeks diverse and inclusive participation. On average, advisory board members should serve no more than two consecutive terms (four consecutive years); however, it is recognized that in the best interest of the magazine program, the tenure of some members may extend beyond the average.

The broad mission of INFORMS' magazine publications necessitates extensive liaison with other INFORMS committees. Every two years, at the start of the chair's term, a team made up of

the chair, the vice presidents publications and marketing, communications, and outreach and the directors of publications and public affairs & marketing will identify the most important committees and/or groups with which to have a liaison from the committee. The advisory board chair shall select members of the advisory board to serve as liaisons to the identified INFORMS committees and groups. The advisory board chair may select other member(s) of the advisory board to serve as liaison to any other committee the chair considers relevant to the needs of the magazine publications.

The INFORMS directors of publications and public affairs & marketing will serve as ex officio members of the advisory board. These staff liaisons will provide logistical support for committee activities, guidance on marketing and digital strategy and publishing industry standards and practices and ensure that all committee activity and advice adheres to INFORMS Policies and Procedures. All magazine operations shall fall under the supervision of the director of publications.

Responsibilities and Reporting

The advisory board shall ensure topics and trends in the profession of operations research, management science, and analytics — as well as topics outside of the profession that bear impact on the profession — are considered for possible editorial coverage in the various magazine publication vehicles published by INFORMS. This includes recommending specific topics for development and specific candidate authors. The various committee/group liaisons shall communicate committee/group activities to the advisory board for discussion and potential recommendation of specific topics to the magazine editorial team including the recommendation of specific candidate authors as appropriate. The advisory board shall meet at quarterly by teleconference, and in person annually in conjunction with INFORMS Annual Meeting. Logistical support shall be provided by the director of publications or an appointed representative thereof.

The advisory board chair shall report on magazine activities and provide any recommendations to the vice president of publications and director of publications. The vice president of publications and director of publications will keep the INFORMS Board of Directors apprised of magazine activities within their regular quarterly publications reporting to the Board.

RELATED DOCUMENTS:

INFORMS Policies and Procedures Manual, Section 1.3, Diversity, Equity & Inclusion INFORMS Policies and Procedures Manual, Section 2.1, General Committee Procedures INFORMS Policies and Procedures Manual, Section 8.1, International Activities Committee INFORMS Policies and Procedures Manual, Section 9, Marketing, Communications, and Outreach INFORMS Policies and Procedures Manual, Section 11.5, Committee on History and Traditions INFORMS Policies and Procedures Manual, Section 11.7.2, OR/MS Tomorrow
INFORMS Policies and Procedures Manual, Section 12.4, Industry Outreach and Engagement Committee INFORMS Policies and Procedures Manual, Section 13.2, Vice President of Publications
INFORMS Policies and Procedures Manual, Section 13.3, Publications Committee INFORMS Policies and Procedures Manual, Section 15.1, Subdivisions Council
INFORMS Policies and Procedures Manual, Section 18.7, Committee on Teaching and Learning

NUMBER 9.7 External Engagement Policy

Approved: Fall 2025

Policy

INFORMS recognizes that external relationships with other organizations can advance its strategic objectives and deliver value to members, the broader profession, and the general public. These engagements may include cooperative activities such as conferences, educational programs, publications, research, awards, or other professional initiatives.

While such relationships can be beneficial, they also carry potential risks to the reputation, brand integrity, neutrality, operational priorities, and member interests of INFORMS. This policy is intended to ensure strategic coherence, institutional integrity, and consistent decision-making across INFORMS and its growing portfolio of external relationships.

To ensure consistency, alignment, and responsible stewardship, this policy governs external engagements involving non-INFORMS entities where the INFORMS name, logo, brand identity, or institutional reputation is used, referenced, or publicly affiliated. The policy applies across the organization, including but not limited to staff, elected leaders, committees, subdivisions, editorial boards, and volunteer groups.

This policy does not replace existing INFORMS Policies and Procedures that govern formal sponsorships, conference co-organization (e.g., Joint Organization and Co-Sponsorship of External Conferences, P&P 10.2.1), subdivision activities (P&P Section 15), or editorial board engagements (P&P Section 13). Rather, this policy provides additional institutional guidance for a wider range of external relationships that fall below the threshold of formal co-sponsorship but nonetheless invoke the INFORMS name, logo, brand, or institutional authority. These include branding affiliations, informal collaborations, and representative participation in external initiatives.

This policy ensures cross-organizational consistency, alignment, and risk management for all such engagements.

Engagements governed by this policy fall into two general categories, which are distinguished by their degree of institutional involvement and exposure.

1) Strategic collaborations: which involve joint development, planning, or delivery of programs, publications, research, or events with clearly shared responsibility or investment. These relationships require formal agreements, active governance, and review by the Board or the Executive Committee, depending on scope and complexity.

2) Affiliated branding relationships: which include situations where an external entity seeks to associate its activity with INFORMS in a limited and symbolic way, such as through

name or logo recognition, or informal collaboration. These relationships do not entail financial support or operational involvement from INFORMS, but they do require review and approval, as they carry reputational implications.

Procedures

All proposed external engagements must be evaluated prior to approval to ensure alignment with the mission, strategic priorities, and ethical standards of INFORMS. The evaluation must consider whether the relationship:

- advances the long-term goals of INFORMS;
- creates or enhances value for INFORMS members;
- protects or promotes the neutrality, brand, and reputation of INFORMS;
- avoids duplication or competition with INFORMS programs and services;
- falls within the available capacity of staff and volunteers.

Where relevant, past performance of similar engagements should also be considered to inform approval.

External entities may not describe INFORMS as a sponsor, co-host, partner, or other related / synonymous terms unless such status has been formally approved and documented.

The authority to approve an external engagement shall be determined by the scope, risk, and functional domain of the proposed relationship.

- Brand-only affiliations or external collaborations that do not involve meetings, events, or significant cross-organizational activity shall be reviewed for approval by the Executive Director.
- External engagements involving meetings, conferences, workshops, or other convening activities – in which INFORMS is being asked to contribute technical programmatic content, co-hosting, or operational support, or when the INFORMS name is used to describe a convening in a manner that could be perceived as an INFORMS-organized technical event – shall be reviewed by the Vice President of Meetings for approval in consultation with the Executive Director.
- Other external engagements that involve cross-functional implications, brand visibility, joint governance, financial investment, or potential reputational risk shall be reviewed by the Executive Director for approval in consultation with the Vice President of Marketing, Communications, and Outreach (VPMCO) and/or other relevant Vice Presidents. Where the scope or risk warrants, such engagements must be presented to the INFORMS Executive Committee for approval.

The Executive Director shall be responsible for the implementation of this policy and may delegate operational duties to appropriate staff as needed, while retaining overall accountability.

All formal external engagements should include written agreements that define the duration and scope of the relationship, roles and responsibilities, branding terms, governance mechanisms, reporting expectations, and exit clauses. INFORMS retains the right to revoke or terminate any external engagement, with or without cause, if the relationship becomes inconsistent with any INFORMS policies, priorities, or public commitments. Disputes or concerns arising from external engagements shall be addressed initially by the Executive Director and the relevant Vice President. If unresolved, such matters may be escalated to the INFORMS President and then the Executive Committee or Board of Directors for final resolution.

Subdivisions, committees, and editorial boards may not independently enter into external engagements that use the INFORMS name, logo, or institutional identity.

For purpose of clarification, this policy does not restrict subdivision-led conferences, journals, or professional activities that are fully self-funded, managed under existing subdivision governance, and does not claim or imply organization-wide sponsorship or endorsement by INFORMS. Any proposed engagement that seeks broader institutional affiliation or brand use must follow this policy.

The VPMCO shall be informed of all external engagement approvals that are subject to this policy. A central record of all approved engagements shall be maintained by INFORMS staff. The VPMCO's Fall Board report shall include a summary of active and concluded external engagements governed by this P&P from the preceding 12 months, including outcomes, risks and benefits, and any recommendations for policy or practice changes.