INFORMS CHAPTERS & FORUMS

New Community Officer Quick-Start Guide

Your first 90 days, role by role

Prepared by INFORMS Community Relations • 2026 Edition

START HERE

If you read nothing else in this guide, do these five things in your first two weeks:

1. Complete your Volunteer Acknowledgments in your INFORMS membership profile.
2. Hold a transition meeting with the officer you are replacing.
3. Get access to your community's shared drive, email list, and INFORMS Connect microsite.
4. Put recurring officer meetings on the calendar for the whole year.
5. Email cteimoori@informs.org to introduce yourself and confirm your roster is current.

How to Use This Guide

This guide is written for every officer of an INFORMS community, including regional chapters, forums, and interest groups. It answers the questions new officers most often ask: what am I responsible for, what has to happen by when, where do the resources live, and who do I call when I am stuck.

It is organized into four parts:

- **Your First 90 Days**: a dated checklist that works for any officer role.
- **Role Checklists**: what each position actually owns, plus a short list of what "good" looks like.
- **The Community Year**: a month-by-month rhythm of deadlines and recurring work.
- **Resource Directory & Handover Packet**: where everything lives, and what to leave behind for the next officer.

Pair this guide with the Community Best Practices Guide, which covers what our highest-performing communities do and why it works.

Part 1: Your First 90 Days

Every item below can be completed by any officer regardless of role. Work through them in order; the early items unlock the later ones.

Days 1–14: Get access and get compliant

- ❑ Complete your Volunteer Acknowledgments (required of all officers, every term). Sign in and acknowledge Conflict of Interest (P&P 2.3), Code of Conduct (P&P 2.4), and Confidentiality (P&P 2.6).
- ❑ Read all three policies before you sign. Links to each are on the acknowledgment page.

- ❑ Confirm your INFORMS membership is current. Officers must be members in good standing.
- ❑ Request admin access to your community's INFORMS Connect microsite (contact cteimoori@informs.org).
- ❑ Collect logins and access for: shared drive, community email account, email distribution list, LinkedIn group or page, website, and any event or payment platforms.
- ❑ Hold a one-on-one transition meeting with your outgoing counterpart. Record it or take notes; you will forget half of it.
- ❑ Introduce yourself to INFORMS Community Relations and confirm the officer roster on file is accurate.

Days 15–45: Understand your community

- ❑ Read last year's Annual Community Activity Report for your community. It is the single best summary of what happened and what did not.
- ❑ Log in to the Community Dashboard and review your financial statements and membership demographics.
- ❑ Download your membership roster from the Connect microsite. Note the split between students, academics, and practitioners, since it should shape your programming.
- ❑ Find your bylaws and check when they were last updated. If the answer is "unknown" or more than five years ago, flag it for review this year.
- ❑ List every communication channel your community currently uses, and who holds the keys to each.
- ❑ Identify the three most engaged non-officers in your community. These are your future officers.

Days 46–90: Build the year

- ❑ Schedule recurring officer meetings for the full year, monthly at minimum and bi-weekly if you are rebuilding.
- ❑ Hold a planning session with officers and advisors to set the year's event calendar in one sitting.
- ❑ Commit to a sustainable cadence. One content event and one social event per quarter is a proven, achievable baseline.
- ❑ Choose one signature event to anchor the year, whether a conference, a recurring seminar series, or an annual meeting.
- ❑ Reach out to local student chapters and university faculty about partnership and co-sponsorship.
- ❑ Identify two or three potential sponsors or industry partners.
- ❑ Recruit an advisory group of past leaders, sponsors, and prospective future officers.
- ❑ Set up your shared drive with folders for: prior reports, event templates, contact lists, budgets, and a running operations document.
- ❑ Assign one officer to own the Annual Community Activity Report and start logging events as they happen, not in December.

THE SINGLE HIGHEST-LEVERAGE HABIT

Keep a running log of every event, attendee count, sponsor, and partnership as it happens. A shared spreadsheet is enough.

Communities that log throughout the year complete the Annual Activity Report in under an hour. Communities that reconstruct it from memory in December consistently under-report their own work and score lower on the Community Excellence Award as a result.

Part 2: Role Checklists

Titles vary across communities. Match yourself to the closest description; in smaller communities one person often covers two or three of these.

President / Chair

You own: Overall health of the community, the calendar, and the leadership pipeline.

- ❑ Set the year's direction and lead the annual planning session.
- ❑ Run officer meetings and keep decisions moving between them.
- ❑ Own the relationship with INFORMS staff and the Vice President of Chapters and Forums.
- ❑ Make sure the Annual Community Activity Report gets submitted. Delegate the work, own the outcome.
- ❑ Actively recruit your successor and your advisory group. Do not wait until Q4.
- ❑ Represent the community at the INFORMS Annual Meeting and connect with peer community leaders.

What good looks like: *A good Chair leaves behind a community that runs without them. If your departure would stall the community, distribute more.*

Vice President / Vice Chair / Chair-Elect

You own: Programming, and preparing to lead.

- ❑ Lead event planning and serve as, or assign, a person-in-charge for each event.
- ❑ Recruit speakers, panelists, and workshop leaders.
- ❑ Shadow the Chair on staff communications and governance so the handoff is a non-event.
- ❑ Manage the volunteer group or advisory committee that supports events.
- ❑ Own one improvement project for the year, such as a new event format, a new partnership, or a revived channel.

What good looks like: *A good VP arrives as Chair already knowing every password, partner, and pending decision.*

Secretary

You own: Institutional memory.

- ❑ Take and circulate minutes for officer and business meetings; store them on the shared drive.
- ❑ Maintain the officer roster, term dates, and contact list; notify INFORMS of any changes.
- ❑ Maintain the running operations document: platforms, logins, vendors, venues, recurring contacts.
- ❑ Track attendance and event details throughout the year for the Annual Activity Report.
- ❑ Keep the bylaws on file and flag them for review when they age past five years.

What good looks like: *A good Secretary makes it possible for a stranger to run the community next year.*

Treasurer

You own: Money, and the ability to say yes to things.

- ❑ Review the Community Dashboard financial statements at least quarterly.
- ❑ Build a simple annual budget tied to the event calendar before the year starts.
- ❑ Track event income and expenses, including sponsorships and registration.
- ❑ Understand what your community can and cannot spend on, and ask staff before committing to contracts.
- ❑ Brief the officers on the balance at every business meeting, in one slide or one sentence.

What good looks like: *A good Treasurer tells the Chair in January what the community can afford, not in November what it cannot.*

Membership / Outreach & Engagement Officer

You own: Growth and retention.

- ❑ Download and review the membership roster quarterly; watch the student-versus-professional mix.
- ❑ Build a recruiting moment into every single event: a QR code, a link, a 60-second announcement.
- ❑ Welcome non-members to events, then follow up personally and invite them to join.
- ❑ Own the relationship with local student chapters and university faculty.
- ❑ Run post-event surveys and feed the results back into programming.
- ❑ Track membership count at the start and end of the year so you can report the change.

What good looks like: *A good Membership Officer can name the last five people who joined and why.*

Webmaster / Connect Moderator

You own: Whether anyone finds out that any of this is happening.

- ❑ Keep the community website and INFORMS Connect microsite current, especially the events page.
- ❑ Post every event to all active channels on a predictable sequence: save-the-date, registration open, reminder, thank-you.
- ❑ Maintain the LinkedIn group or page and the email distribution list.
- ❑ Follow the INFORMS Branding Guide on logos, colors, and typography for all materials.
- ❑ Archive past event pages and materials rather than deleting them. They are proof of activity.

What good looks like: *A good Webmaster means a member never has to ask "is this chapter still active?"*

> **IF YOUR COMMUNITY HAS VACANT ROLES**
>
> Do not fill seats with whoever is available. Instead, create a low-commitment entry point: an advisory committee or volunteer group where people help plan one event before taking on a title.
>
> Communities using this approach report it as their most reliable source of future officers.

Part 3: The Community Year

A predictable rhythm beats an ambitious but erratic one. Use this as a starting template and adjust to your community's reality.

When	What happens	Who leads
December – January	Annual Community Activity Report submitted (also your Community Excellence Award entry). Officer transitions complete; Volunteer Acknowledgments submitted. Full-year planning session sets the calendar.	Chair, Secretary
Q1	First content event and first social event. Budget finalized; sponsors approached. Membership roster reviewed and baseline count recorded.	VP, Treasurer
Q2	Second content event and social event. Student chapter and university partnerships activated for the fall. Mid-year check-in on the Dashboard.	VP, Membership
Q3	Third content event and social event. Signature event planning enters final stretch. Nominations and elections process begins for next year's officers.	Chair, VP
Q4	Signature event or annual conference. INFORMS Annual Meeting: connect with other community leaders. Transition meetings scheduled with incoming officers. Activity report drafted from the running log.	All officers

Communities that hold a single December or January planning session and set the whole year's calendar at once consistently report higher event counts and steadier attendance.

The six criteria your activity report is scored against

The Annual Community Activity Report doubles as your Community Excellence Award submission. Meeting four of the six criteria earns the award, and there are no tiers and no limit on how many communities receive it. Knowing the criteria in January makes them easy to meet by December.

Criterion	What to be doing all year
Membership	Track your count at the start and end of the year. Run recruiting moments at every event. Report the change with a number.
Value to Members	Programming, networking, professional development, career support, recognition.
Value to Community	Outreach beyond your own membership: students, K–12, other associations, the public.
Communications	Multiple active channels with a predictable event communication sequence.
Special Initiatives	One distinctive thing: a competition, a prize, an advocacy event, a new program.

Criterion	What to be doing all year
Administrative Tasks	Volunteer Acknowledgments, current bylaws, complete officer roster, timely report submission.

WHERE COMMUNITIES MOST OFTEN LOSE POINTS

Across the 2026 reports, Membership and Special Initiatives were the two weakest criteria, not because communities were not doing the work, but because they could not produce a number or name a distinct initiative.

Both are fixable with a spreadsheet and one deliberate idea per year.

Part 4: Resource Directory

Bookmark the Subdivision Leadership Resource Center. Nearly everything below lives there.

Resource	What it is for	When you need it
Subdivision Leadership Resource Center	The central library for all officer documents and forms.	Bookmark it week one.
Officer Guide	Foundational overview of roles and responsibilities.	First two weeks.
Community Best Practices Guide	What high-performing communities do and how they do it.	Before your planning session.
INFORMS Branding Guide	Logos, colors, typography for all community materials.	Any time you make a flyer, slide, or web page.
Volunteer Acknowledgments	Required of every officer, every term. Covers Conflict of Interest, Code of Conduct, and Confidentiality; completed in your membership profile.	First two weeks, every term.
Community Dashboard	Financial statements and membership demographics.	Quarterly, at minimum.
INFORMS Connect microsite	Roster downloads, direct member email, event pages, discussion.	Ongoing. Requires admin access.
Activity Report portal	Annual report and Community Excellence Award submission.	Opens annually in December. Progress can be saved and resumed.
Officer webinars	Recorded sessions on running a community.	Any time.

Support INFORMS staff can provide

Several communities each year report they did not know these were available. They are.

- Marketing your events through INFORMS communication channels.
- Setting up event pages on INFORMS Connect and registration in Zoom.
- Access to the INFORMS Zoom account and features, including breakout rooms.
- Day-of-event coordination support.

- Connecting you with potential speakers and with other communities for joint events.
- Guidance on governance, elections, bylaws, and financial administration.

Ask early. Staff support is easiest to provide with three to four weeks' notice. Contact Chelsea Teimoori at cteimoori@informs.org.

Your handover packet

Before your term ends, make sure the following exists in your shared drive. The best communities treat this as a living folder, not a year-end scramble.

- ❑ Prior years' activity reports.
- ❑ Event planning templates and checklists.
- ❑ A running operations document listing every platform, login owner, and resource needed to run the community.
- ❑ Contact lists: members, speakers, sponsors, venues, university partners, student chapter leads.
- ❑ Budget history and current financial position.
- ❑ Bylaws and their last revision date.
- ❑ A short "what I would do differently" memo from each outgoing officer.
- ❑ A scheduled one-on-one transition meeting per role, plus a check-in 30 days later.

QUESTIONS?

Chelsea Teimoori, Community Relations Coordinator, cteimoori@informs.org

Reach out about admin access, governance questions, event support, marketing help, or anything you cannot find in the Resource Center. No question is too small; most of what is in this guide came from officers asking.