

# **Conference Planning Handbook**

## **CORS/SCRO**

### **Accompanying Files**

1. **AuthorIndex.pdf:**
2. **CORS 2012 Sponsorship Opportunities Package.pdf**
3. **CORS 2012 volunteer schedule.xls**
4. **CORS Conference Menu Planning.xlsx**
5. **CORS2012FoodPlan.pdf**
6. **CORS2012Society Functions Meetings.pdf**
7. **DetailedProgramFinal.pdf**
8. **MasterSchedule.pdf**
9. **ProgramOverview.pdf**
10. **Common Schedule.xlsx**

### **Prepared and maintained by the Program Committee**

Update History:

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Updated by: Elkafi Hassini, September 28, 2012

Updated by: Corinne MacDonald, June, 2012

## Purpose

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The purpose of this handbook is to serve as a guide to those who wish to organize a CORS Annual Meeting & Conference. Some of the organization of the conference is left up to the discretion of the organizing committee; hopefully, this document will provide some helpful advice from those who have previously been involved in organizing a CORS conference. Also, some of the required elements of the conferences, such as the Annual General Meeting, are described in detail.

Throughout the entire planning phase of a conference, the organizing committee should keep the CORS Council up to date on its plans, and should seek advice and/or clarification on the requirements of CORS.

## Timeline

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These timelines indicate the minimum required times.

- 2 years for CORS only - 4 years for CORS/INFORMS - 5 years for CORS/IFORS	Council approves conference chair
- 18 to 24 months for CORS only - 3 to 4 years for CORS/INFORMS - 4 to 5 years for CORS/IFORS	Choose a hotel(s) and/or convention centre and prepare a budget for CORS council.
- 18 to 24 months for CORS only - 3 years for CORS/INFORMS - 4 years for CORS/IFORS	Conference chair forms an organizing committee, including a program chair
- 1 year	Web site alive with information for registration and cluster chairs
- 1 year	First Call for papers
- 1 year	Start sponsorship drive (send out packages)
- 6 months	Second Call for papers
- 3 months (depends on early reg. deadline)	Assess registration numbers
- 3 months (depends on early reg. deadline)	First Registration Reminder Email
- 3 months (depends on early reg. deadline)	Program Master Plan + First Draft
- 2 months (depends on early reg. deadline)	Arrangements for AV
- 2 months (depends on early reg. deadline)	Arrangements for Delegate bags
- 6 weeks (depends on hotel contract)	Second Registration Reminder Email + Hotel Booking Reminder
- 1 month (depends on hotel contract)	Assess hotel occupation rates
- 1 month	Email Presentation Instructions
- 10 days (depends on on-site reg. deadline)	Get registrations data
- 7 days (depends on provider's deadlines)	Finalize food order numbers

## About the Conference

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The CORS conference is an annual event that brings OR academics from Canada and abroad. In addition during the conference CORS holds its annual members general meeting. The conference is usually solely organized by CORS. However, recently there is an increasing trend of holding the conference jointly with other sister/umbrella societies such as INFORMS, IFORS and MITACS as well as special interest conference such as JOPT and MOPGP. Usually these joint conference attract more attendees and as a result generate more profits for CORS.

### Choosing the dates

The conference organizing committee should consult with Council on the dates for the conference. The conference is typically held between mid-May and mid-June. There are several issues to consider in choosing the dates:

- Convocation tends to be held in June in most universities in the country; some grad students and/or faculty members may opt not to attend the conference if there is a conflict
- There are a few conferences, such as the IIE conference, that many CORS members also attend; conflicts with these conferences should be avoided
- Victoria Day should be avoided, if possible

Starting the conference on a Monday and ending the conference around noon on Wednesday has long been a tradition of CORS. However, if operating a joint conference with another group, this may need to be changed (e.g. joint conference with MITACS in Edmonton, 2010, was held from Wednesday to Friday).

The advantage to ending the sessions midday on Wednesday is that many people can head home that afternoon and arrive at a reasonable hour. Experience has shown that many will leave prior to the end of events on Wednesday. The implications of this are that the coffee ordered for the Wednesday coffee break should be about half of the normal order. As well, while it is possible to schedule a plenary talk on Wednesday, the committee should expect that it would not be as well attended as those held on the first two days.

### Conference Venue

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The venue for the conference sessions may be held at a university (as was the case in London, 2007 and Quebec in 2008), at a conference center (as in Edmonton, 2010) or in the conference facilities of a hotel (as in Toronto, 2009, St. John's, 2011 and Niagara Falls, 2012). University space (and catering) is often available at a very economical rate and can be an attractive option, provided sufficient hotel space is located nearby. The advantage to holding the conference at a hotel is that there could be financial benefits to the conference, such as discounts on meeting space, depending on the amount of room-nights the conference is willing to guarantee. However, given the nature of our conference, several small breakout rooms that can hold up to 50 people (theatre style) will be required, and many hotels do not have such facilities.

## Requirements for the Conference Venue

The space requirements will, of course, depend on the specifics of the particular conference, but generally the following must be arranged for CORS:

- Rooms for concurrent paper sessions (“Theatre style”). The number of rooms required will depend on the expected attendance and the number of plenary sessions planned. (See the section on the conference schedule, and the file [Common Schedule.xlsx](#) to assist with this planning). Usually at least 7 concurrent session rooms will be required; perhaps fewer on Wednesday morning. While sometimes rooms with a capacity of 20-30 will suffice, the Special Interest Group (SIG) sponsored sessions (As of 2013, Forestry, Health Care and Queueing) will attract about double the attendance of other sessions, and therefore larger rooms should be booked.
- One room large enough to accommodate all those in attendance, for the plenary session and the Larnder Lecture, typically held in the morning (see Conference Schedule below)
- One room (separate from the above mentioned room) for the AGM & Luncheon, arranged dining room style with a head table, projector and podium. The room must be large enough to accommodate all CORS members in attendance, including student members.
- Depending on the number of Special Interest Groups (discussed below), one or more rooms available for Monday or Tuesday evening after the last session for a meeting for each of these groups. The concurrent paper session rooms should be appropriate. NSERC may also require such a room.
- A boardroom for the CORS Council meetings, held at lunch time on day 1 and day 3 as well as late afternoon on the day before the conference (see Schedule session below). This room MAY require access to a speakerphone (in case a Council member cannot attend the conference but wants to call into the meetings – check with the CORS secretary).
- A lockable storage room for the conference organizing committee near the conference meeting rooms is recommended, optimally from the day before the first day of the conference until the final day. Internet and phone access should be available. Registration tables may be set up outside this room, and then materials stored in the room overnight.

## AV

Hotels usually provide AV through a subcontractor. Generally this company would know the premises and hotel personnel better than other companies. Make sure you check the costs and arrangements before making a commitment.

## Exhibitions

We usually do not have exhibitions in CORS conference. However, this may be an opportunity to get some sponsorships. Make sure you check for the hotel for space availability and the related services they provide to exhibitors (e.g., reception of boxes and storage as well as tables/booths) and their costs.

## Contract negotiations

These are the major aspects that need attention when negotiating:

- **Number of presentation rooms needed.** This depends on the event and the facility. Generally we require rooms that can handle parallel sessions each of 50 seats. However, few hotels would have enough of these rooms. In the recent conference from 7 to 13 rooms were required. The hotel will provide a plan for their facility, but it is advised that one of the organizers visits the facility as some rooms may have non-standard designs/sizes that may not be appropriate for all sessions.
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- **Number of bedrooms required and rates.** Pay attention to the deadlines for when changes to these requirements cannot be made. Obviously, the closer to the conference days the better. Hotels generally will require a close date of 4 weeks prior to the event. Also pay attention to the *attrition rate*, the minimum percentage of rooms required before the hotel can apply a penalty.
- **Concessions:** if not provided as default, ask for
  - complimentary guestroom for every xx (e.g., 50) guestrooms paid
  - complimentary Suite for the duration of Conference dates (e.g., for keynote speaker?)
  - x (e.g., 2) complimentary room upgrades
  - x (e.g., 2) staff rooms at xx% (e.g. 50%) of the guestroom rate for the duration of the conference dates
  - special rates for parking
  - special arrangement for airport to-and-from transport
  - Free WiFi in guest rooms or at least in conference floors

While hotel usually design well differentiated offers from their competitors, it is advised that you look at the previous year(s) contracts to obtain an idea about the deal. This can often be used as a negotiation tool as well.

## Conference Schedule

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The following are possible two options for a CORS conference schedule. (See Common Schedule.xls for more details). While there is much flexibility in designing this schedule each year, some parts are requirements:

- The President's breakfast should be on the first day, prior to the start of the first session
- There must be at least 1.5 hours scheduled for the AGM lunch.
- The SIG meetings must be scheduled at a time where there is no other activity
- At least 20 minutes per talk in the concurrent sessions

The organizing committee must review plans with CORS Council.

Option 1:

- 10 Slots for Concurrent Sessions (or additional plenaries)
- Concurrent Sessions are 80 minutes long, with four 20 minute papers per session
- 2 Plenary Sessions (one must be the Larnder lecture)
- Starts at 8:30, Finishes at 5:30 except for SIG meeting
- 1.5 hours for lunch both days
- 20 minute coffee breaks

	Day1	Day2	Day3
7:30 - 8:30	President's Breakfast		
8:30 - 9:50	Concurrent Sessions	Concurrent Sessions	Concurrent Sessions
9:50 - 10:10	Coffee Break	Coffee Break	Coffee Break
10:10 - 11:30	Plenary	Concurrent Sessions	Concurrent Sessions
11:30 - 1:00	Lunch / CORS Council	AGM Lunch	CORS Council
1:00 - 2:20	Concurrent Sessions	Plenary	
2:20 - 2:40	Coffee Break	Coffee Break	
2:40 - 4:00	Concurrent Sessions	Concurrent Sessions	
4:00 - 4:10	Break	Break	
4:10 - 5:30	Concurrent Sessions	Concurrent Sessions	
5:30 - 6:30	SIG Meetings		
6:30	Reception	Reception/Banquet	

Option 2:

- 13 Slots for Concurrent Sessions/Plenaries, 60 mins long
- Paper sessions have three 20 minute presentations
- Could easily turn one Concurrent Session into a one hour plenary session
- 2 Plenary Sessions (one must be the Larnder lecture)
- Starts at 8:30, Finishes at 5:00 except for SIG meeting
- 1.5 hours for lunch both days
- 30 min morning coffee break and two 15 min afternoon breaks

	Day1	Day2	Day3
7:30 - 8:30	President's Breakfast		
8:30 - 9:30	Concurrent Sessions	Concurrent Sessions	Concurrent Sessions
9:30 - 10:00	Coffee Break	Coffee Break	Coffee Break
10:00 - 11:00	Larnder	Plenary	Concurrent Sessions
11:00 – 12:00	Concurrent Sessions	Concurrent Sessions	Concurrent Sessions
12:00 – 1:30	Lunch / CORS Council	AGM Lunch	CORS Council
1:30 - 2:30	Concurrent Sessions	Concurrent Sessions	
2:30 – 2:45	Coffee Break	Coffee Break	
2:45 - 3:45	Concurrent Sessions	Concurrent Sessions	
3:45 – 4:00	Break	Break	
4:00 - 5:00	Concurrent Sessions	Concurrent Sessions	
5:00 - 6:00	SIG Meetings		
6:00	Reception	Reception/Banquet	

## Registration

A registration desk will should be available during all days of the conference, usually opening at 7:00 am. In addition, it is customary to have the registration desk open on the day before for three or four hours, say 4:00-7:00 pm in case some delegates would like to register. A regular person, usually CORS administrator, as well as student volunteers would run the registration desk operations. It is convenient to have a printer set up for the registration volunteers and the membership services provider to use.

## Breakfast

In 2012 a breakfast was provided and it was well received. The timing would usually be 7:00-8:30 am. Whether it will be provided or not will largely depend on the conference budget. This should be clear to the organizers about 4 weeks before the event, when they should have enough time to arrange with the food provider.

## Past President's Breakfast

In 2013, it was agreed that those Past Presidents of the society who are attending the conference should be invited to a breakfast meeting on the first day of the conference, prior to the start of the first concurrent session. The current president, past-president, vice-president will also attend; therefore, breakfast for approximately 15 people will be required. The organizers should consult with CORS council for a final count.

## Concurrent Sessions

- Sessions can be scheduled to include 3 or 4 papers, but each paper must be given AT LEAST 20 minutes, and each paper should receive the same amount of time regardless of how many papers are scheduled in the session (e.g. if 3 papers are scheduled in a 1:20 minute session, they should still each get 20 minutes)
- If a scheduled presenter fails to show up, the session chair should ask the next presenter to wait to what would have normally been his/her start time. This is done to

enable “session hopping” for members who may wish to attend two talks given in different rooms.

- The program chair is encouraged to contact council for advice on scheduling sessions into breakout rooms, as often times some hotel breakout rooms are larger than others. As previously mentioned, SIG sponsored sessions are typically well attended, as are sessions on teaching OR. Cluster chairs may also have advice on this issue.

### **Tutorials/Panels**

- A tutorial is essentially a talk that lasts the entire length of one Concurrent Session time slot. An indepth talk that would of interest to only a subset of CORS members would be a good candidate for a tutorial session. The SIG presidents may request such a tutorial be scheduled.
- A panel can also be scheduled for the entire length of one Concurrent Session time slot. Panel members would be asked to speak for a short amount of time on a particular topic, with the remainder of the time devoted to discussion. This idea was suggested by a member of the Forestry SIG; as of 2013, requests for panels should come from the SIG presidents or from Council

### **Plenary / Larnder Lecture**

- The Plenary is for all conference attendees.
- One of the plenary sessions is for the Larnder lecture. It is customary to hold the Larnder lecture on Tuesday morning, although it has taken place on Monday to accommodate the speaker
- Although there have been times where a Plenary Session has been held on Wednesday, it is typical to schedule concurrent sessions only.
- At Monday’s plenary, it is customary for either the Chair of the Organizing Committee, CORS President, or some other designated person to say a few words of welcome to everyone before introducing the speaker
- The Larnder Prize presentation is usually done on stage before the award winner begins his/her talk, although it has also been officially done at the Awards Banquet. If the presentation has taken place at the talk, the emcee of the awards banquet should ask the award winner if he/she would also like to say a few words on stage at the banquet, or simply stand and be acknowledged once again. In 2012 the award was given during the banquet awards, this was done in consultation with the awardee.
- Organizers should keep in mind that if they wish to schedule an additional plenary session, that such a session takes up a time slot equal to #breakout rooms x #papers/session. If space is tight, this could be an issue.

### **Coffee Breaks**

- Coffee/tea/beverages should be provided mid-morning and mid-afternoon. It is up to the organizing committee to decide if coffee is to be provided prior to the first session, and whether or not to provide food with the mid-morning break. If no breakfast is provided, a snack/fruit may be provided with the coffee.
- At some venues, breakout rooms are located quite a distance or on a different floor than the main conference area. If that is the case, the committee should consider putting the coffee service nearest to where the attendees will be at that time



## **Lunch Break on Day 1**

- Lunch on Day 1 is usually “on your own”, but the conference committee is free to offer lunch if they so choose or especially if there is no place near the conference venue to purchase lunch (e.g. London, 2007, provided free lunch boxes as there was no restaurant near the conference venue)
- In the conference package, it would be helpful for the organizers to provide suggestions to attendees on where to get lunch if it isn't provided

## **Reception**

- It is typical for the organizing committee to organize a reception for all attendees on Monday evening. Some groups have held this event outside of the venue, while others simply hold it on site. This decision is up to the organizing committee.
- Minimally, bar service (for a fee) and finger foods are provided; the point is to allow people to socialize before going out for dinner (or home, for those from the local area).
- Depending on budget, the committee may opt to give out “drink tickets” to cover the cost of one or more beverages.
- Again, in the conference package, it would be useful to provide members with suggestions on where to go for dinner after the reception

## **Annual General Meeting (AGM)**

- It is a requirement of the society to hold this meeting, and it has been the society's tradition to do so over lunch on the second day of the conference
- No other scheduled events can be taking place during the AGM (all members must be free to attend)
- A minimum of 1.5 hours is required for the AGM
- Lunch must be provided for all CORS members (including Student members).
- Because there will be speakers throughout the luncheon, the organizers should consult with the hotel staff to find the best meal option to accommodate the meeting. A simple self-serve buffet (e.g. pre-made sandwiches) works well
- The Council will need a projector and screen (for a Powerpoint presentation), and a podium with a microphone. A head table should be set up, if there is room, but is not absolutely necessary.
- Since the room will need to be prepared for lunch, and the Council needs time to setup for the meeting, it is important that the room used for the AGM lunch is vacant just before the meeting. The staff will also need time to clear the room after the meeting, so therefore nothing should be scheduled in this room immediately after the AGM.
- If the Larnder lecture (or a plenary) and the AGM have to be held in the same room due to space limitations, then the Larnder lecture should be moved to Day 1, and a set of sessions held just prior to the AGM.

## **CORS Council Meetings**

- Pre-Conference meeting (Sunday), usually 4:00-8:00 pm (the CORS secretary will advise the organizers). The meeting should be in a board room for about 15 people. Dinner will be provided (either in the room, in a nearby room, or in the hotel restaurant)
- Two CORS Council meetings are held during the conference; one on the first day (Monday) during the lunch break, and one on the last day (Wednesday) after the last

session. Both will require a room at the conference venue that can accommodate 20 – 25 people, boardroom style, and lunch (i.e. sandwiches) must be provided. The conference organizers should make such arrangements in consultation with CORS secretary.

- The first lunch meeting will involve all section presidents, committee chairs, as well as the members of Council. Members of the “new” council that officially takes over after the AGM may attend if they wish.
- The meeting on the last day is for the incoming council. Note that the CORS secretary is responsible for advising those who should attend.
- Starting 2014, Meeting of Advisory Board of Past President on Monday Morning, prior to the first session. Breakfast will be provided.
- The cost of these meetings will be covered by the conference.

In your communication with Council it is a good idea to double check the meetings schedule. Check the accompanying template in the file called [CORS2012Society Functions Meetings.pdf](#).

### **Special Interest Group (SIG) Meetings**

- In 2011, it was agreed that CORS would begin to sponsor Special Interest Groups (SIGs). It was agreed that the CORS organizing committee would arrange a meeting space and time for these groups; a likely meeting time would be after the last session of the 1<sup>st</sup> day, prior to the reception, for one hour. The organizing committee need only make the arrangements for the room (to accommodate approximately 50 people); no food or refreshments are required. Council should be advised of these arrangements so that they may advise the groups.

### **Awards Banquet**

The Awards Banquet is typically held on the second to last day of the conference (in the normal schedule, that would be Tuesday night). The event is normally preceded by a small reception; at a minimum, attendees need a place to congregate until the banquet room is ready for seating. Bar service (for a fee) is usually provided, but typically food is not. Once again, organizers may wish to provide a drink ticket for the reception.

Tickets are provided to both CORS members and non-members who paid the full conference fee; a banquet ticket is not provided to student members. However, many advisors purchase tickets for students who may be winning an award. The committee should also note that several attendees leave on the second day of the conference, and will not use their ticket; it is customary to ask that those who do not need their ticket leave it at the registration desk, and for the organizing committee to take names of students who wish to attend and distribute those unused tickets to these students in some fair manner.

Typically, prior to dinner service, the emcee can welcome everyone and then advise that the awards portion of the evening will start over coffee. In 2010, the organizers gave out many of the awards in a ceremony held in a different room prior to the reception; this was not well received by many CORS members.

A podium with microphone is required, preferably on a stage or platform. There should be room for award winners to come on the stage and pose for photos with their presenters. No head table is required, but at least two tables should be reserved near the stage; major award

winners (Larnder, Solandt, Merit) and their guests and presenters should be seated at these tables, joined by CORS council members.

An agenda is provided below as a guide. The presenters listed are those who typically are asked to give out the award, but this is up to the organizing committee and/or CORS council.

- Introduction and Welcome (before dinner)
- ~ Dinner ~
- Open Awards Ceremony
- Introductions
  - Special Guests
  - CORS Past Presidents<sup>1</sup>
- Service Awards<sup>2</sup> (Presenter: Incoming CORS President)
- Student Paper Competition Winners (Presenter: Education Chair)
  - Open Category
  - Undergraduate Category
- Practice Prize<sup>2</sup> (Presenter: Chair of Practice Prize Committee)
- Solandt Award<sup>2,4</sup> (Presenter: Chair of Solandt Award Committee, or Conference Chair, or CORS Council President)
- Harold Larnder Prize<sup>2,3</sup> (Presenter: Chair of Larnder Award Committee, or Conference Chair, or CORS Council President)
- Award of Merit<sup>2,4</sup> (Presenter: Preferably a previous winner, or someone on Council, who knows the winner)
- Promotion for subsequent year's conference (Presenter: Chair or member of organizing committee)
- Final Words (Presenter: Either someone from the Organizing Committee, or the emcee)
- Close of Ceremonies

<sup>1</sup>Ask them to stand as their names are called; start with the longest serving past president, up to the incoming president. Tip: check with registration to see who is in attendance, but then double check prior to the awards ceremony to make sure everyone is attending the banquet.

<sup>2</sup> For the Service, Practice Prize, Solandt, Larnder and Award of Merit, the emcee should first say a few words about the award (e.g. "The Practice Prize is given to recognize the challenging application of the OR approach to...") and then ask the presenter to come up and talk about this year's competition and winner(s).

<sup>3</sup> Since the formal presentation of this award would have taken place before the Larnder lecture, the emcee can simply introduce the winner, who may or may not wish to say a few words (consult with him/her prior to the banquet).

<sup>4</sup> The winner of the Award of Merit and the individual accepting the Solandt award should be invited to say a few words (they should both be advised in advance so that they may prepare)

The organizers should select someone to act as the emcee in advance of the conference (it would be advisable for this person to be someone who is familiar with CORS and who has attended previous conferences, but this is up to the discretion of the organizing committee). The emcee should be tasked with setting the agenda for the night, preparing the slide show, and consulting with all presenters prior to the event. Some presenters may have slides they wish to include.

When the CORS conference is a joint event with another group, the organizing committee must take care to ensure the CORS awards are given the respect they deserve. Depending on the number of attendees who are not CORS members, the organizing committee may wish to organize a separate banquet for CORS members.

A photographer should be on hand to take photos of each award winner on the stage as they are presented with their award. Quality photos are required as the pictures may be used in the Bulletin or on the website.

## **Electronic Issues**

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### **Website**

A website should be setup as early as possible (see timeline, above) to facilitate the marketing for the conference. Typically, the conference chair will host the web site in their university. CORS is currently (2013) working on setting up a web site that would facilitate hosting conference site on cors.ca.

### **Registrations**

Registrations are currently (2012) processed by the CORS administrator through a secure electronic form. Registrations are submitted online and then the administrator processes the payments manually, for a fee of \$8/transaction, through the credit card processing companies. CORS is (2012) working on building a secure payment system on its website.

The host university may offer a payment option through their website; this is another option.

### **Electronic Submission**

In the 2011 and 2012 a programmer was hired to setup an electronic submission system for the conference using a code that was already paid by CORS in the past. The programmer required an update fee of around \$1,400 in 2012. Although some complaints were made about how the system interacts with cluster chairs, the program chairs usually find it very helpful in the end in generating the detailed program, in a MS Word format, that would be distributed to the attendees.

### **Call for papers**

In addition to CORS email list, call for papers should be distributed widely through other email lists (INFORMAS and related lists) as well as conference web sites (INFORMS, EIRO, NetLib, etc...)

## **The Program**

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The program conference chair is a key player for the conference. The richness of the program (through the choices of cluster chairs and topics) and the quality of plenary speakers (well established experts) is important for increasing registrations.

The program chair is responsible for determining clusters and assigning chairs to them. He/she would also make sure that deadline are met and a program is produced early enough to encourage people to register.

### **Abstract Submissions**

The deadline should be set in a way that a response to the authors reaches them early enough before the early bird registration deadline; typically early March for a conference in Mid-June.

The program chair should clearly specify how acceptance will be signaled. For example, a mass email could be sent to all authors of accepted abstracts after the deadline passes.

## Special Journal Issues

It is a idea to work on having special journal issues with the conference. This would be attractive to researchers outside Canada as many universities now will support their researchers financially only if a full paper will be considered for publications. Current INFOR editor in chief, Bernard Gendron, is open to having special issues associated with the conference. In 2012 three special issues were arranged.

## Master Schedule

Consulting both the hotel contract and current registrations numbers the program chair will build a master plan. See template below used in 2012 in the accompanying file called [MasterSchedule.pdf](#).

## Detailed Program

In 2011 and 2012 the electronic submission system automatically generates detailed program in a MS Word format. This file still needs some fine tuning to have the final version that can be posted and distributed to delegates, such as adding a welcome message, session details, awards, meeting and hotel information. Consult previous program booklet to get an idea. Usually you would also need to design the cover pages. In 2012 the back cover was used to include the logos of the sponsors. See the accompanying files called [AuthorIndex.pdf](#), [DetailedProgramFinal.pdf](#) and [ProgramOverview.pdf](#).

## Budget

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A budget needs to be prepared to CORS council about one year before the event while securing the conference venue. After the conference a full financial statement is required within six months.

## Revenues

The majority of revenue comes from registrations. In 2012 there was also an effort to secure sponsorships, a little more than \$12,000.

## Expenses

The following table includes the major cost items with some estimates based on attendance of 300 to 350 people (Niagara Falls, 2012):

Cost Item	Description	Estimate
Printing	Booklet printing about	\$2,500
AV	Projector for each room, podium and screens for plenary room	\$15,000 to \$18,000
Food and Beverages	See food and	\$40,000 to \$55,000

	beverages section	
Room Rental	Depends on Hotel contract	\$0 to \$5,000
Web Design	Only code updating	\$1000 to \$1,500
Conference swag (bags, bottles)	Typical bag with simple gift, badges and badge holders	\$3,500 to \$5,000
Hotel Internet	Depend on hotel contract	\$0 to \$1,000
Registration	Processing	\$2,500 to \$3,000
Credit Card Bank Fees		\$3,500 to \$5,000
Speakers Expenses	Larnder Winner	\$1,500 to \$3,000

## Registration Process

For members, three registration fees are offered:

- “early-bird”, with a deadline 6-8 weeks prior to the conference;
- regular, with a deadline one-week prior to the conference; and then
- an on-site registration fee, typically \$50 higher than the regular fee.

It is acceptable to stop taking online registrations 1 week prior to the event, and require those who have not yet registered to do so on site. Organizers should anticipate some on site registrations, and should prepare additional registration packages to accommodate these.

Typically the deadline for sending in abstracts occurs prior to the early bird registration date. A mass email to authors reminding them of the early bird registration will result in a spike in registrations, as many who know for certain they will be attending will choose this option. Experience has been that 50 – 60% of those who will attend will register by the early bird deadline.

## Expenses for the Larnder Prize Winner & Other Plenary Speakers

The expenses of the Larnder prize winner are to be paid by CORS. The winner will be invited to the entire conference (free registration), and his/her accommodations from Sunday to Wednesday will be reimbursed by CORS. Therefore, the conference organizers may wish to have the hotel expenses for the Larnder prize winner added to the hotel bill for the conference. This should be worked out with the CORS treasurer prior to the event. In 2012 the winner chose to pay their own travel fees. It is advised that the organizers check with the speaker on what they prefer, some academics they find it normal to pay their own expenses with their research grants.

While the organizing committee is free to invite other plenary speakers to the event, the expenses of these speakers are not covered by CORS. If the organizing committee wishes to invite a plenary speaker requiring travel expenses, those expenses should be approved by CORS.

## Profit Sharing

In case of joint conference a memorandum of understanding would outline clearly the profit sharing arrangement with CORS and the other party.

The hosting chapter, when relevant, is entitled to a share of any profits realized by the conference. In calculating this profit, the costs for the AGM luncheon and the CORS Council meetings are not included in the totals for the conference costs. In other words, the profit is defined as the difference between total revenue (registrations and sponsorships) and direct conference costs (hotel space, food excluding CORS luncheon and CORS council meetings, and all other direct costs for putting on the conference).

## **Conference Bank Account**

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There are a few banking alternatives to use when planning a conference:

- Use a bank account setup by your university
- Use the bank account for your local CORS section
- Setup your own bank account solely for the purposes of the conference

It is requested that you not use the CORS bank account directly to organize a conference.

## **Sponsorship**

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There are different possibilities for sponsorship such as hosting university, software companies and publishers. The types of sponsorship are also different such as conference bag, plenary, coffee break. See the accompanying file called [CORS 2012 Sponsorship Opportunities Package.pdf](#).

## **Food & Beverage**

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There will be several people that may have special requirements when it comes to food. Conference caterers are used to providing alternative meals for a handful of guests, but to avoid having to make arrangements for too many people, you may wish to avoid selecting beef or pork as the main dish at the banquet. There should always be a vegetarian option. Other considerations are those with allergies or sensitivities, especially to nuts, dairy or gluten. Make sure to clearly obtain this information during the registration process. You may also want to consider having those at the registration desks asking about this again when attendees pick up their registration packages to ensure that if they do have any food requirements, especially allergies, that these have been properly recorded. Special meals for such individuals can usually be arranged on short notice, but you cannot depend on there being ready options at the time of the meal if no notice has been provided.

- Note from Halifax, 2005: We had lobster as our main meal during the final banquet, but clearly listed a chicken dinner as an alternative and asked for people to indicate which they wanted at the time of registration. We expected that many would not want seafood, but to our surprise, less than 10 of the 175 attendees opted for chicken!
- Note from St. John's, 2011: In order to avoid the problems with picking one dish that you hope will satisfy most everyone, the St. John's committee opted for a top tier buffet for the final banquet, featuring several main dish selections including a wide variety of seafood. It was very well received.

Make sure you also survey the CORS council for their dietary restrictions.

In your communication with CORS you can use the template in the accompanying file called [CORS2012FoodPlan.pdf](#).

In 2012 a spreadsheet was used for planning that proved to be very helpful. See the accompanying spreadsheet file called [CORS Conference Menu Planning.xlsx](#)

## **Delegate Bags**

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A company should be contacted as soon as the final registration numbers become available. Generally start contacting the company two months before the conference, but try to get them to give you flexibility in terms of when you can confirm the final numbers so that you avoid ordering much more than you need.

## **Running the Show**

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It is important to have the conference chair, program chair and local chair on board during all the conference days.

### **Booklets and Bags**

Likely you will leave the printing of booklets and badges until a day or two before the conference, so as to make sure all changes are incorporated and you have an up to date registration list. Expect several onsite registrations, so print extras. You would need to rely on two student volunteers to manage the booklet printing and badges printing and assembling. It is a good idea if the badges are stored in an alphabetical order.

Once the material are ready you would need to arrange for a minivan to transport them to the hotel storage room.

### **Name Tags & Tickets**

Name tags should include the person's name and organization. Tickets, such as drink tickets for the reception, can be included in the sleeve for the nametag. Since only CORS members can attend the AGM luncheon, it is important for the organizers to either provide a ticket to each CORS member for the AGM, or some other means of identifying CORS members on the name tag (such as coloured dots).

### **Hotel key people**

In case the hotel does not invite you, make sure you ask for a "day-before" meeting with the hotel key personnel: the person you have been in contact with for the contract, manager of conference/events, AV people and any other relevant manager. This is very helpful for getting help if you need it on the days of the conference, and you will certainly need it.

### **Registration Desk**

Make sure that arrangements are made with the hotel for where the registration table will be and that tables (usually three) will be available. You may also want to ask for an easel to post major announcements as well as an extra table for advertising material. In addition to CORS administrator you will need to have three or two (depending on period of day) student volunteers to help with registration. It is advisable to bring a printer that can stay at the registration desk to print last minute name tags, registration receipts, etc.

### **TV Screens**

In case the hotel has them, TV Screens could be a nice way to reach the delegates with the day's program and any last minute changes. This was used efficiently in Niagara Falls in 2012.

### **Volunteers**



You will need to secure at least four student volunteers, three to run the registration desk in peak times (usually first three hours of first two days) and one to supervise session for any issues. It is a good idea to set an alternating schedule for the volunteers. See the attached file called [CORS 2012 volunteer schedule.xls](#).

### **Photographer**

It is important to secure a skilled photographer for the banquet (awards ceremony), the AGM, and the Larnder lecture. These photos need to be of high quality as they may be used in the Bulletin or on the website. In 2012 the organizers sought CORS members through the email list to find a photographer. A CORS member volunteered to do the job in return for free registration.

### **Social Events**

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Depending on the location, it may be attractive to organize social events such as tours of touristic attractions, barbeque, or sports activity (race?). A workable arrangement is to contract a local company that specializes in these events using a contract that would be risk (financially) free for CORS. See Erkut [1] for an example where CORS actually made profits out of such a program. In 2012, the organizers set up an optional plan with no financial obligations for CORS.

### **References**

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Erkut, E. Yield Management at Banff: Two Contrasting Examples. CORS Bulletin, 39 (1) 24-27, 2005.