



CORS • SCRO

Canadian Operational Research Society  
Société canadienne de recherche opérationnelle

## **CORS Administrative Handbook**

**Note: This administrative handbook, the CORS Conference handbook, CORS Accounting processes and procedures, and the CORS Treasurer's handbook form the complete set of CORS operating policies and procedures. Any policy or procedure not described in one of these documents is subject to approval by the CORS Council.**

**Last Revised: 5 March 2025**



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# CORS ADMINISTRATION

## Administrative Positions

All files for Administrative Positions are housed in Google Drive. The CORS Secretary has administrative access.

### CORS Council

The Council is made up of the elected Officers of the Society, four elected Councillors, the Immediate Past President, a representative designated by each local section of the Society, and the Standing Committee Chairs, if not otherwise a Council Member.

### Executive Committee

The Executive Committee is made up of the elected Officers of the Society, the four elected Councillors, the Immediate Past President, and the Standing Committees Chairs.

### Elected Officers

The elected officers of the Society are the President, Vice-President, Secretary, and Treasurer.

### Elected Councillors

Four councillors are elected to the Council, each to serve a two-year term. The terms are offset by one year to ensure continuity.

### Elected Student Councillors

Following a discussion at the 2023 Annual Conference, members voted in favor of adding a Student Councillor to the Society's governing body. One councillor is elected to serve a one-year term.

### Standing Committees (as specified in Bylaw 6 (a))

- Education and Student Affairs Committee
- Membership Committee
- Program Committee
- Public Relations Committee
- Publications Committee



## Ad hoc Committees

- Awards Committee
- Award of Merit
- EDI Committee
- Financial Planning
- Nominating
- Past Presidents Advisory Board
- Practice Prize
- SIG Committee
- Student Paper Competition
- Travelling Speakers Program

## Appointed Positions

- INFOR Editor
- Bulletin Editor
- IFORS Representative

## Contracted Positions

- Administrative Coordinator
- Web Administrator

## Directors and officer's insurance

As a result of a motion on September 16, 2022, CORS/SCRO purchased a \$1,000,000 Directors and officer's insurance policy from PROLINK Insurance Inc. The contact is:

- Andrew Spencer, Account Executive
- Tel: 416-644-7715
- Email: AndrewS@prolink.insure
- 150 King Street W. Suite 2401, P.O. Box 16, Toronto, ON M5H 1J9

## Duties and Responsibilities of Administrative Positions

### President

- Oversees the general management of the Society following the CORS Constitution and administrative handbook.
- Examines the Society's achievements and performance in the light of council-approved decisions and policies and initiates or encourages new ideas relevant to the Society.
- Acts as the official public representative of the Society, representing the views and interests of the Society:
  - at conferences and meetings, either in person or by written submission
  - in dealings with other societies and associations (UKORS, EURO, INFORMS)
  - in communicating with government agencies (NSERC, SSHRC, CIHR).
- Collaborates with the CORS annual conference local organizing Committee to ensure the Conference is organized in accordance with CORS policies.
- Maintains contact with Local Section and Student Chapter Presidents. In reference to Bylaw 11 (d), the CORS President ensures that changes to the Local Section and Student Chapter Executive are approved by the Council.
- In consultation with the Secretary, sets the agenda for the Society meetings (AGM), the Executive Committee, and the CORS Council.
- Chairs meetings of the Society, the Executive Committee, and the CORS Council.
- Chairs the Financial Planning Committee.
- Ex-officio member of the Nomination Committee, the Financial Planning Committee, and each Standing Committee.
- Contact the winners of the CORS Award of Merit and Service Award by phone to offer congratulations and to extend an invitation to attend the Awards Banquet at the CORS National Conference. The initial contact is to be followed up with an official congratulatory letter.
- Emails thanks to the reviewers of the Student Paper Competition, Undergraduate Category. (May 2018)
- Updates and passes the Rivett Mug to the incoming President at the AGM.
- Contact new Council members to encourage them to participate actively in CORS activities.

### Vice-President

- Assists the President in performing duties.
- Assumes the duties of the President in the President's absence or in the event the President resigns.
- Is a member of the Financial Planning Committee. (September 2009)
- Chairs the Program Committee (June 1, 2011)
- Chairs the Special Interests Group Committee (May 29, 2013)
- Chairs the Awards Committee (September 20, 2013)

## Secretary

### Council Meetings

- Responsible for ensuring that the Council holds meetings according to a timetable agreed upon in the first meeting of a newly established Council. The following timetable is typically followed (although, through a vote of the Council, it may be changed through the course of the year):
  - last day of CORS National Conference (1st meeting of newly established CORS Council)
  - last Friday of September (2nd meeting of Council\*)
  - last Friday of November (3rd meeting of Council\*)
  - last Friday of January (4th meeting of Council\*)
  - last Friday of March (5th meeting of Council\*)
  - first day of CORS National Conference (Last council meeting in conference city). Following Bylaw no. 7(b), a summary of the year's Council meeting minutes is presented to those attending this meeting.

Since 2010, only one of these meetings takes place in person, at a venue agreed upon by Council members. This venue should be one that does not result in unreasonable costs for the Society. All other meetings are held via videoconferencing.

- In consultation with the President, prepares the agenda for Executive Committee meetings and makes arrangements for meeting location, teleconferencing, etc.
- Ensures the distribution of meeting materials at least one week in advance of the meeting.
- Records minutes of the meeting and distributes, in a timely manner, a final report to CORS Council members.

### Annual General Meeting (AGM)

- Responsible for ensuring that the local organizing committee of the CORS National Conference has accommodated and made arrangements for the Annual AGM luncheon. Usually, the AGM is held on the 2nd official day of the Conference (Tuesday).
- In consultation with the President, prepares the agenda for the Annual General Meeting and ensures that it is approved at the 5th Council meeting.
- Prepares the Secretary's Report for presentation at the AGM and ensures that it is approved for presentation at the 6th Council meeting. The Secretary's Report consists of membership statistics and the main motions passed by the Council since the last AGM.
- Distributes the meeting agenda, Secretary's Report, and minutes of the last AGM to members at the AGM.
- Records the minutes of the AGM and ensures that they are approved by the Council and available for distribution at the next AGM.

### Annual Election

- If an election is warranted, coordinates the election process with the Administrative Coordinator ensuring that:
  - a ballot, the biographical sketches of the candidates, and a return, addressed and stamped envelope, is mailed to the membership by the first week of April;
  - a response date of no later than April 30 be specified on the ballot or a date not less than a full week before the Annual AGM;



- the results of the vote and the names of the successful candidates are communicated to the Council on or before its 6th meeting;
- New members of the Council, whether elected or acclaimed, are invited to the 1st meeting of the Council.

### Miscellaneous Duties

- Prepares a list of all award recipients and prize winners conferred at the CORS National Conference and ensures that it is included as part of the minutes of the 1st Council meeting.
- Prepares a list of new council executives, sends it to the Editor-in-Chief of INFOR, and attaches it to the minutes of the first council meeting.
- Serves as the IFORS representative. (Motion: September 18, 2009)
- Provides the Administrative Coordinator with updates to the CORS Handbook.
- In coordination with the treasurer, updates the list of officers with Corporations Canada after the AGM.
- The CORS President, CORS Secretary, and CORS Treasurer are listed as corporation directors at <https://ised-isde.canada.ca/site/corporations-canada/en>. The CORS Secretary is responsible for updating this information annually and filing the required annual report with Industry Canada.

### Treasurer

- Appoints, in consultation with the Council, an auditor to review the Society's financial accounts.
- Appoints, in consultation with the Council at the first or second meeting of a new Council, an auditor to review the Society's financial accounts at the end of the current fiscal year.
- Maintains the Society's financial accounts and prepares any reports or forms associated with the financial affairs of the Society, e.g., sales tax remittance to CRA, maintaining the nonprofit status of the Society.
- Maintains the Society's bank account.
- Provides a report on the current financial position of the Society at each council meeting.
- Responsible for any disbursements of funds associated with the operation and maintenance of the Society, including but not necessarily limited to CORS Councillors, Administrative Coordinator, local Section budget allocation, CORS Awards, Graduate Student Funding program to attend CORS national conferences, INFOR journal, CORS Council and IFORS subscription fees.
- Works with the bookkeeper to ensure timely bookkeeping and reconciliation of bank statements with accounting software.
- Prepares financial statements at year-end and submits them to the retained accounting firm in a timely manner to receive the accounting firm compilation engagement report no later than 3 weeks before the AGM.
- Provides a draft of the Treasurer's Report to Council no less than 3 weeks before the AGM. The report consists of a table showing the previous year's projected budget, the actual budget, and the budget projected for the upcoming year. This report must also include a compilation engagement report of CORS's financial statements from the accounting firm retained by the Council for the previous fiscal year.
- Presents the treasurer's report at the AGM.
- Keeps Treasurer handbook updated.
- Sits as a representative of CORS on Conference organizing committees.



- At the latest, by the 3rd meeting of a new Council, when all transactions for a conference have been entered in the SAGE accounting software, presents a conference profit and loss report to the Council and the local organizing committee.

## Councillors

- Participate with other members of the Executive Committee in running the Society.
- Undertake special projects at the behest of the Council.

## Student Councillor

- The Student Councillor represents the interests of our student members and advocates on their behalf.
- The Student Councillor has the same voting privileges as other Councillors.

## Past President

- Assists the Council and the President with maintaining continuity with the work at the National Council.
- Acts as Chair of the Nominating Committee.
- Ensures that a Call for Nominations for open positions on the CORS Council is included in the January/February issue of the CORS-SCRO Bulletin.
- Ensures that biographical sketches of nominees are included in the March/April issue of the CORS-SCRO Bulletin.
- Reports to the Council at its March meeting whether it is necessary to conduct an official election of officers for the CORS Council. If the number of candidates does not exceed the number of available positions on the Council, the candidates will be declared elected by acclamation.
- Is a member of the Financial Planning Committee. (September 2009)
- Responsible for administration of the Traveling Speakers Program, including sending out a message in the Fall via the Mailing List, which provides details on how to apply for TSP funding.
- Chairs the Past President's Advisory Committee (May 20, 2013)

## Education Committee Chair

- Chairs the Education Committee, which consists of the Student Paper Competition Chairs. (Motion: June 17, 2009)
- Oversees the Student Paper Competition.
- Administers the CORS Diploma program.
- Administers the Graduate Student Funding to Attend CORS Conferences and Graduate Student Conference Support programs. (Motion March 2022 to remove SSHRC funding from competition)
- Provides the webmaster with the information needed to keep the CORS website's OR Programs in Canada page current and accurate.
- Advise Council on matters relating to OR education.

- Works with institutions interested in establishing courses in OR.
- Presents the Education Committee Report at the AGM. The report summarizes CORS Diploma recipients, student paper competitions, and graduate student funding to attend the CORS conference.

### **Membership Chair**

- Acts as the primary liaison between the CORS Executive Committee and the Administrative Coordinator for membership services.
- Ensures that the contractual obligations of the Administrative Coordinator are met as they pertain to membership services.
- Chairs the Membership Committee.

### **Program Committee Chair**

- Chairs the Program Committee, which consists of the CORS VP (Committee chair), the previous conference/program chair, and the next conference/program chair. (Motion: June 1, 2011)
- Acts as the primary liaison between the CORS Executive Committee and the Program Chair of the CORS National Conference program.
- Responsible for all aspects of the CORS National Conference program.

### **Public Relations Committee Chair**

- Prepares proposals for publicizing the Society and its activities generally and submits these to the Council for approval.
- Ensures that Society's publicity material is up to date.
- Oversees the preparation of new publicity material as directed by the Council.
- Prepares media releases as appropriate.
- Maintains a mailing list for distributing CORS membership brochures, Society promotional material, conference posters, etc.
- Establishes arrangements with Canadian Universities to have CORS membership brochures posted on bulletin boards in faculties of OR, Business Administration, Systems Science, etc., and to make brochures available to students who wish to apply.

### **Publications Chair**

- Acts as Editor-in-Chief or Editor of INFOR.
- Participates with the INFOR Editorial Board in formulating editorial policies.
- Appoints associate editors to INFOR.

## Bulletin Editor

- Oversees the publication of the CORS Bulletin four times a year, generally in January, March, July, and October.
- Determines the content and solicits contributions to the issue.
- Provides the Administrative Coordinator with all the material required to assemble and format the issue, including translations, pictures, etc.
- Proofreads and approves the issue for publication and distribution.

## Social Media

- LinkedIn: CORS has a presence on LinkedIn  
<https://www.linkedin.com/company/canadian-operational-research-society/about/>  
 The account is associated with the email address info@cors.ca, and the Administrative Coordinator can grant access to update content. The President will grant permission for access as appropriate.
- Twitter: The @CORS\_President Twitter handle is the responsibility of the CORS president. Access will be granted as part of the normal Vice-President to President hand-off procedure.

## CORS Administrative Coordinator: Bookkeeping, Membership and Coordination Services

In the Bylaws, any time an article references the Membership Services provider, the reference is to the Administrative Coordinator.

### Responsibilities:

Responsibilities for the bookkeeping, membership, and coordination services are described in detail in the contract signed between CORS and the person responsible for delivering said services. The contract in question is available in the President's folder on Google Drive.

In general, the responsibilities are:

- Maintaining the SAGE accounting system and working with the treasurer to ensure timely reporting of financial activities.
- Managing all activities related to membership services, including issuing awards and maintaining the CORS mailing list, CORS website, and CORS documents on Google Drive.
- Acting as administrative coordinator of CORS.

# Operations Guide for CORS

Last Revised: November 20, 2023

Date	Description of Event or Task
January - General	Prepare accounting month-end statements, including bank reconciliation for October, November, and December.
	Prepare 3 <sup>rd</sup> quarter (October, November, December) tax report and remit taxes to CRA.
4 <sup>th</sup> week of January	The 4 <sup>th</sup> Meeting of the Council is to be held on the last Friday of the month. Decisions regarding the Solandt and Larnder Awards recipients are to be approved at this meeting. Nominations for Council positions discussed.
End of January or Early February – General	Issue 1 of the INFOR Journal to be published and distributed.
	Issue Number 1 of Bulletin to be distributed to the membership. It should also include a Call for Nominations for Council positions.
January 15	Renewal notices sent via email to the membership with a letter from the President.
February 15	Notice sent via the Mailing List to members that membership fees are due April 1.
March 15	Reminder message sent via email to those who have not yet paid.
Last week of March	The 5 <sup>th</sup> Meeting of the Council is to be held on the last Friday of the month. Decisions on recipients of the Award of Merit and Service Award should be made at this meeting. Determination of whether an election to fill Council positions is required.
April 1	Membership fees due.
April 15	Reminder message sent via email to those who have not yet paid.
April – General	Issue Number 2 of the Bulletin distributed to the membership. The issue is the pre-conference issue and includes the biographies of nominees for Council positions. Should give notice of important items to be discussed at the Annual General Meeting. The issue is to announce the recipient of the Larnder Prize and include a biography.
	Election of new Council members is conducted if necessary.
	Prepare accounting month-end statements, including bank reconciliation for January, February, March.
	Prepare the 4 <sup>th</sup> quarter (January, February, March) tax report and remit taxes to CRA.
	Prepare year-end accounting statements and send them to retained accounting firm for review
May 15	Reminder message sent via email to those who have not yet paid.
May – General	CORS Awards and Certificates sent to organizers of the CORS National Conference.
	CORS National Annual Conference generally held unless another date and month is established to accommodate joint conference hosting.



Date	Description of Event or Task
	Meeting of CORS Council held in the host city of the CORS Conference. This is the meeting where Local Sections report on their activity throughout the year, and the CORS Council presents an overview of the activities of the Council for the past year.
	The annual general meeting of the society held in conjunction with the CORS Conference. Year-end reports of various Standing Committees and the Annual Membership Report are presented as well as the motions approved by Council throughout the year. New Council Members announced and introduced. Important items presented and discussed by the membership.
	CORS Annual Awards Banquet held during the CORS Conference, generally on Tuesday evening.
	1 <sup>st</sup> Meeting of the CORS Council held on the last day of the CORS National Conference. Appointments of Standing Committee Chairs to be made at this meeting. A plan for Council meetings throughout the year should also be determined at this meeting. An accounting firm must be confirmed for the fiscal year at this or the 2 <sup>nd</sup> meeting.
	Issue Number 2 of the Journal INFOR to be published and distributed.
	The CORS website updated to reflect all prize winners, election results, and all other pertinent information from the meetings held at the CORS National Conference.
June 15	Reminder message sent via email to those who have not yet paid.
June – General	Ballot regarding important items discussed at AGM undertaken if necessary.
July 15	Reminder message sent via email to those who have not yet paid.
July – General	Issue Number 3 of the Bulletin distributed to the membership.
	Prepare accounting month-end statements, including bank reconciliation for April, May, June.
	Prepare 1 <sup>st</sup> quarter (April, May, June) tax report and remit taxes to CRA.
August 1	Reminder message about membership fees sent from the CORS president.
August 15	The administrative coordinator sends the list of overdue members to Section and Chapter Presidents.
August – General	Issue 3 of the Journal INFOR to be published and distributed.
Last week of September	2 <sup>nd</sup> Meeting of the Council held on the last Friday of the month. An accounting firm must be confirmed for the fiscal year at this or the 1 <sup>st</sup> meeting.
October 1	Memberships of those 6 months overdue automatically discontinued.
October - General	Prepare accounting month-end statements, including bank reconciliation for July, August, and September.
	Prepare 2 <sup>nd</sup> quarter (July, August, September) tax report and remit taxes to CRA.



<b>Date</b>	<b>Description of Event or Task</b>
End of October/ Early November – General	Issue Number 4 of the Bulletin distributed to the membership. The issue includes a Call for Nominations of Awards, new Competition information, and deadlines. Issue 4 of the Journal INFOR to be published and distributed.
Last week of November	3 <sup>rd</sup> Meeting of the Council held on the last Friday of the month.



# CORS AWARDS AND COMPETITIONS

## Harold Larnder Prize

Last Revised: Based on a motion passed by the Council at its meeting on January 22, 2021 (honorarium for the recipient of the Larnder, Solandt, and Merit Award is increased by \$75, and certificates will only be printed and not framed). Revised: Based on a motion passed by the Council at its meeting on November 29, 2013.

### Description

The Harold Larnder Prize is awarded annually to an individual who has achieved international distinction in operational research. The prize winner delivers the Harold Larnder Memorial Lecture, on a topic of general interest to operational researchers, at the National Conference of the Canadian Operational Research Society.

### Award

A certificate and expenses to attend the Conference. An honorarium of \$75 is added to the expenses as compensation for framing the certificate.

### Selection Considerations


The nominee should be internationally recognized for making important contributions to Operational Research. Recipients can be from anywhere in the international community. Suggestions for nominations should be forwarded to the Vice-President (Chair of the Committee).

### Administration of the Award

The Awards Committee is responsible for nominating a recipient, with input from the local Conference organizing Committee.

### Important Dates and Deadlines

Date	Task
September to December	The Awards Committee solicits and evaluates potential nominees for the Award, with input from the Conference organizing Committee. A call for nominations should be sent via the Bulletin and/or Mailing List.
By January 31	The Awards Committee recommends a nominee for the Award to the Council. The Council then must approve the selection. To be awarded the prize, the nominee must be able to attend the upcoming CORS conference – the Chair of the Awards committee is responsible for contacting the nominee and ensuring this is the case. If the selected nominee is unable to attend, another selection must be made and approved by Council. The Conference Chair is to be involved in communication with the recipient of this Award.



Date	Task
By February 28	The Awards Committee Chair ensures that the Bulletin Editor announces the Larnder Lecture Winner in the March/April issue of the bulletin and provides a biography and/or profile of the recipient.
	The Awards Committee Chair submits the information to OR/MS Today for publication, as well as to IFORS.
At least 6 weeks before the Conference	The Awards Committee Chair is to provide the Administrative Coordinator with the name of the Larnder Winner as it is to appear on the certificate.
At least 4 weeks before the Conference	The administrative coordinator to prepare a certificate template and send it to the Awards Committee for review.
At least 3 weeks before the Conference	Administrative coordinator to produce Official Certificate.
At least one full week before the Conference	If the Administrative Coordinator is not attending the Conference, the certificates must be sent to the Conference organizing Committee via courier (at CORS expense). The Administrative Coordinator can bring the certificates to the Conference, if attending.
Larnder Memorial Lecture at the CORS Conference	At the Conference, the CORS President introduces the Harold Larnder Prize Winner and presents the certificate to the winner immediately before or after the Harold Larnder Memorial Lecture. At the conference Awards Banquet, it is customary to acknowledge the Larnder prize winner again. The winner should be asked (in advance) if they wish to say a few words at the Banquet.

Expenses of the Winner are to be submitted to the CORS Treasurer for reimbursement. The administrative coordinator is responsible for informing the treasurer of the recipient's name for reimbursement of expenses, including the honorarium.



## Omond Solandt Award

Last Revised: Based on a motion passed by the Council at its meeting on November 29, 2013. Revised: January 19, 2011, based on material submitted for inclusion is Volume 45 Number 1 (February 2011) of the Bulletin. In response to the direction of the Council on November 26, 2010.

### Description

The Omond Solandt Award is presented to an organization, private or governmental, that is deemed to have made an outstanding contribution to Operational Research in Canada.

### Award

The Omond Solandt Award plaque.

### Selection Considerations

It is the responsibility of the Awards Committee, with input from the Local Conference Organizing Committee, to select the recipient of the Solandt Award. Where possible, the nominee is a local, regional, or national organization significant to the local area.

### Administration of the Award

The Awards Committee is responsible for nominating a recipient, with input from the local Conference organizing Committee.

### Important Dates and Deadlines

Date	Task
September to December	The Awards Committee solicits and evaluates potential nominees for the Award, with input from the Conference organizing Committee. A call for nominations should be sent via the Bulletin and/or Mailing List.
By January 31	The Awards Committee puts forward a nominee to the CORS Council. CORS Council must approve the selection.
By February 28	The Awards Committee Chair informs the winner and invites the recipient to send a representative to accept the Award at the Awards Banquet at the upcoming CORS Conference. The Conference Chair is to be involved in communication with the recipient of this Award.
At least 6 weeks before the Conference	The Awards Committee Chair provides the Administrative Coordinator with the name of the winner and the inscription to appear on the Omond Solandt Award plaque. The Chair should also provide the Administrative Coordinator with the name of the person who will be attending to accept the Award on behalf of the recipient.
At least 5 weeks before the Conference	The administrative coordinator arranges for the plaque to be produced. The finished plaque is to be delivered to the Chair of the Local Conference Organizing Committee (by the Administrative Coordinator provider in person or via courier).



<b>Date</b>	<b>Task</b>
Upon receipt of the plaque	The local conference chair to send confirmation of receipt of the plaque to the administrative coordinator.
At the CORS Conference	The CORS President introduces and presents the plaque to the winner at the Awards Banquet.
Before the end of June	Awards Committee Chair to submit a synopsis of the organization, including the rationale for its selection as the Solandt winner to the Bulletin Editor for inclusion in the post-conference issue of the bulletin and on the CORS website.

## Eldon Gunn Service Award

Last Revised: Based on a motion passed by the Council at its meeting on January 22, 2021. Revised: Based on a motion passed by the Council at its meeting on November 29, 2013. Revised January 20, 2011, based on material submitted for inclusion in Volume 45 Number 1 (February 2011) of the Bulletin. In response to the direction of the Council on November 26, 2010.

### Description

The Eldon Gunn Service Award is presented to members of the Society who have made outstanding contributions of time and service to the Society: at the national or local level, as conference organizers or as editors of CORS publications. Eldon Gunn was a major contributor to the Society since the early 1980s and to operational research in Canada since the 1970s. He was one of the first recipients of the Service Award in 1987, after serving on the Council and acting as conference chair for the 27<sup>th</sup> annual Conference in Halifax in 1985. He went on to serve as President of the Society in 1991 and continued his service with passion up until his passing in 2016.

### Award

A certificate. An honorarium of \$75 is sent to each recipient as compensation to frame the certificate. The administrative coordinator is responsible for informing the treasurer of the names of the recipients for sending the honorarium.

### Selection Considerations

Eligibility is determined based on the point system outlined below. As a guideline, winners should be at or above the 2000-point level. Typically, three to four awards will be given each year. In exceptional circumstances, self-nominations will be accepted.

Responsibility	Point Value (Per year served)	Responsibility	Point Value (Per year served)
<b>CORS Council</b>		<b>International Conference</b>	
President	500	Conference Chair	350
Vice-President	350	Committee Chair	300
Secretary	300	Committee Member	200
Treasurer	300	<b>National Conference</b>	
Councillor	250	Conference Chair	300
Appointed Member	200	Committee Chair	250
Past President	250	Committee Member	200
<b>Local Council</b>		<b>Publications</b>	
President	250	Bulletin Editor	200
Vice-President	175	INFOR Editor	350
Secretary	150	INFOR Special Issue	250
Treasurer	150	Others	150
Others	100		
Past President	100		

**Concurrent appointments**

Suppose a nominee served in two positions in the same year, which are worth  $x$  and  $y$  points according to the above. If one position is for CORS National and one is for a local section, the nominee shall receive  $x + y$  points. If both positions are for a local section or both positions are for CORS National, then the nominee shall receive  $\max(x,y)$  points.

**Administration of the Award**

**Committee Members:** Awards Committee

**Important Dates and Deadlines**

<b>Date</b>	<b>Task</b>
October 1	CORS Vice-President to submit a Call for Nominations for potential recipients to the Bulletin Editor for inclusion in the October and January issues of the bulletin.
End of January	The CORS Vice-President verifies the information submitted for the various nominees and reports to the CORS Council on potential recipients at its January meeting.
End of February	Deadline for nominations.
End of March	Nominees presented to the CORS Council for approval at its March meeting.
April 1	CORS President to contact winners by phone, offering congratulations and extending an invitation to attend the Awards ceremony.
	CORS President to follow up initial contact with an official letter.
	CORS President to inform Administrative Coordinator and Committee Chair which winners will be attending the event.
1 <sup>st</sup> Week of April	CORS Vice-President to provide the Administrative Coordinator with the names of the winners. A mailing address should also be provided if the winner will not be attending the ceremony. The CORS Vice-President should also indicate which certificates are to be produced in French.
2 <sup>nd</sup> Week of April	Administrative coordinator to prepare templates of certificates and send them to the CORS Vice-President for review.
3 <sup>rd</sup> Week of April	Administrative coordinator to produce Official Certificates.
At least one week before the Conference	Administrative coordinator to get certificates to the Local Conference Chair by hand delivery or by sending by Priority Post.
CORS Annual Conference	CORS Vice-President introduces and presents certificates to the recipients at the Awards Banquet.
Before the end of June	CORS Vice-President to submit the names of winners and a brief description of justification for the Award to the bulletin editor for inclusion in the post conference issue of the bulletin and on the CORS website.



## Award of Merit<sup>1</sup>

Last Revised: Based on a motion passed by the Council at its meeting on January 22, 2021. Revised: January 19, 2011, based on material submitted for inclusion in Volume 45, Number 1 (February 2011) of the Bulletin. In response to the direction of the Council on November 26, 2010.

### Description

The Award of Merit is presented annually to a current or past member of CORS in recognition of significant contributions to the profession of operational research.

### Award

A certificate. An honorarium of \$75 is sent to the recipient as compensation for framing the certificate. The administrative coordinator is responsible for informing the treasurer of the name of the recipients for purposes of sending the honorarium.

### Selection Criteria

Significant contributions to the profession of OR can include:

- being specially recognized as an operational research practitioner;
- the development of a methodology relevant to the use of operational research;
- the supervision and development of operational research competence in others;
- the promotion of operational research in Canada through talks, presentations, articles, books, or by other means.
- service to CORS at either the national or local level.

### Administration of the Award

**Committee Chair:** Immediate Past President of the Society

**Committee Members:** Immediate Past President and the two previous winners of the Award.

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<sup>1</sup> Prior to 1983 the Society awarded the CORS Gold Medal. Initially, this award recognized the best paper published in INFOR, but then was given for the best paper published anywhere by a CORS member. The goals of the award were (1) to recognize the achievements and contributions of a CORS member and (2) to create an image of the ideal standards of the profession, as seen by CORS and thus serve to advance the level of professionalism in OR. As the process proved to be too complicated, the current format was adopted.

## Important Dates and Deadlines

Date	Task
October 1	Committee Chair to submit a Call for Nominations for Award of Merit to the Bulletin Editor for inclusion in the October and January issues of the bulletin. The Chair also contacts Committee members to advise them of their duties and to agree on a process.
End of January	Committee Chair to provide the CORS Council with a status report on the Award (potential nominees, etc.) at its January meeting. If warranted, a Call for Nominations may be circulated on the CORS Mailing List.
End of March	Nomination presented to the CORS Council for approval at its March meeting.
April 1	CORS President to contact the winner by phone offering congratulations and extending invitation to attend the Awards ceremony.
	CORS President to follow up with an initial contact with an official letter.
	CORS President to inform the Administrative Coordinator and Committee Chair whether the winner is attending the event.
1 <sup>st</sup> Week of April	Committee Chair to provide the Administrative Coordinator with the name of the Award of Merit Winner and the certificate inscription. The administrative coordinator should also be informed whether the recipient should have the certificate inscription appear in French. If the winner will not be attending the ceremony, a mailing address should also be provided.
2 <sup>nd</sup> Week of April	The Administrative coordinator to prepare a certificate template and send them to the Committee Chair for review.
	Administrative coordinator to produce Official Certificate.
At least one week before the Annual Conference	The administrative coordinator to get certificates to the Local Conference Chair by hand delivery or by sending them by priority post.
CORS Annual Conference	The Committee Chair introduces and presents the certificate to the Award of Merit Winner at the Awards Banquet.
Before the end of June	Committee Chair to submit a biography (including a picture) of the Award of Merit winner to the bulletin editor for inclusion in the post-conference issue of the bulletin and the CORS website.



## Practice Prize Competition

Last revised: November 2013 based on material submitted for inclusion in Volume 47 Number 4 of the Bulletin.

### Description

The Practice Prize Competition recognizes the outstanding application of OR by practitioners in Canada, and it attracts quality papers to the CORS Annual Conference.

### Award

The Prize Committee will determine, at its discretion, First, Second, and Honourable Mention awards and the distribution of up to \$1800 in prize money according to the extent to which the finalists have reported on a completed, practical application with results that had a significant, verifiable, and (preferably) quantifiable impact on the performance of the client organization. Every member of the winning team receives a certificate. The administrative coordinator is responsible for informing the treasurer of the names of the recipients and the amounts awarded.

### Eligibility

The applicant must be a resident of Canada. The submission must include work completed over the last two years, but the entire project may have taken longer. The project may include published work, but it cannot have been previously submitted to this competition.

### The Process

By **February 28**, applicants must submit electronic copies of the following to the Chair of the Practice Prize Committee:


- An abstract that does not exceed 500 words, outlining the successful application of OR.
- A letter from an executive of the client organization attesting that the application had an impact and giving permission for the project to be presented at the CORS Annual Conference.
- The names, titles, phone numbers, and email addresses of all authors and at least one executive of the client organization.

By **March 31**, the Judging Committee, consisting of three past winners of the Practice Prize, will select up to four finalists according to the following criteria:

- The challenge of the application of OR and the significance of the problem.
- The quality of the analysis, modeling, and implementation of the results.
- The impact on the client organization.

By **April 30**, the finalists must:

1. Submit a detailed written report, not exceeding 25 pages in the body, presenting a "case history" of the project describing its development from start to finish and focussing on the challenges and results.
2. Submit a one-page project summary including key messages and best practices, suitable for publication in the CORS Bulletin and on the CORS website.
3. Present the project at the Practice Prize Sessions at the CORS National Conference.



Based on the written report and the oral presentation, the judges will determine the prizes to be awarded and announced at the Banquet. The Committee reserves the right not to award any prize.

As soon as the Judging Committee has selected the finalists, the Chair must advise the Conference Organizing Committee so that the papers can be added to the conference schedule. When the winners are determined, the Chair must notify the Administrative Coordinator to arrange for the preparation of the award certificates, advise the treasurer on how the prizes are to be dispersed, and forward the one-page project summary of the winner(s) to the Bulletin Editor for inclusion in the next edition.





## CORS Student Paper Competition

Last Revised: January 24, 2020. Some changes regarding awards, selection considerations, and judging have been made to reflect current practices and requirements.

This section applies to the CORS student paper competitions (undergraduate and open) only. SIG Student paper competitions follow the guidelines developed by individual SIGs.

### Description

Each year, CORS conducts a student paper competition to recognize the contribution of a paper either directly to the field of operational research through the development of methodology or to another field through the application of operational research. The competition showcases the high quality of OR education in Canada and the excellence of the new generation of operational researchers. Prizes are awarded in two categories: Undergraduate and Open.

### Requirements

The applicant must be enrolled as a full-time student in a Canadian institution in an undergraduate, master's, or PhD program during the school year in which the paper is submitted for consideration. Canadians who are studying outside of Canada are also eligible. Papers for which all applicants are undergraduates may be submitted to either category: Open or Undergraduate, but not to both. Papers for which some authors are graduate students must be submitted to the Open category. MBA students (and other specialized master students) must submit to the Open category with their applied projects. Published papers are eligible for the competition only if their initial submission date (for publication) is after the previous year's CORS Annual Conference.

Supervisors and industry partners may appear as co-authors on the paper, but the first authors must be the applicants. The applicants must have made substantial contributions to the project and have written the paper with only minor editorial assistance. If the paper includes such non-student authors, the supervisor should include information about the various authors' roles when confirming the students' eligibility.

All competitors should apply for CORS student funding by the deadline in case they become finalist.

### The entry includes:

1. Abstract of 200 words or less. Author's name, address, phone number, and email address. Make sure the abstract clearly highlights the motivation, contribution, and potential impact of the paper.
2. Academic institution and supervisor's name, if applicable.
3. Indication of whether the team is planning to attend the CORS Annual Conference if selected as finalists. Note that papers selected as finalists must be presented at the Conference to be further considered for a first prize or honourable mention.
4. A PDF copy of the paper:
  - a. No longer than 35 pages (with minimum 1-inch margins, maximum 34 lines per page, and minimum font size of Times 11), including all figures, tables, appendices, and references.



- b. The submitted paper must not contain information identifying the authors or their institutions.
5. An email from the supervisor indicating that the participant is the first author of the paper should be sent to the competition chair.
6. The same paper can be submitted to multiple CORS paper competitions in the same year. However, it CANNOT be selected as finalist to multiple CORS paper competitions in the same academic year (either SIGs, Undergraduate Category, or Open Category). If a paper is selected as finalist by multiple competition committees, then the student has to decide in which competition the paper remains as finalist.
7. Once a paper has been awarded as Winner or Runner Up in any CORS paper competition (either SIGs, Undergraduate Category, or Open Category), the same paper cannot be submitted again to a CORS paper competition.

### Selection Criteria

- Contribution of the paper either directly to the field of operational research through the development of methodology or to another field through the application of operational research
- Originality
- Writing style, clarity, organization, and conciseness of the paper

### Awards

- Prizes are awarded per paper. The payment is sent to the first author, and the allocation of prize money is up to the co-authors.
- Open Category: First Prize \$500, Honorable Mention \$100. One Award per team.
- Undergraduate Category: First Prize \$200, Honorable Mention \$50. One Award per team.
- All papers selected as finalists receive a certificate.
- If an undergraduate student wins the Open Competition, no undergraduate prize will be awarded.
- Honourable mentions will be provided if there is no winner.

Where applicable, conference organizers are encouraged to provide early-bird registrations and banquet tickets for the finalists (one ticket per finalist or group).

### Administration of the Award

**Committee Chair:** Appointed by CORS Council.

**Committee Members:** Committee members (judges) are selected by the Committee Chair.

### Important Dates and Deadlines

Date	Task
1 <sup>st</sup> Meeting of new CORS Council	Appointment of Student Paper Competition Committee Chairs. Normally, a person is appointed for each section of the student paper competition, undergrad and open.



<b>Date</b>	<b>Task</b>
October 1	The Committee Chair to submit an announcement to the Bulletin Editor for inclusion in the Fall and subsequent issues of the bulletin and to the Administrative Coordinator so that updates to the appropriate web pages can be made.
By the end of the year	The Committee Chair selects Committee members.
End of March	Deadline for competition entries.
	Chair of the Committee to be in receipt of copies of the papers to be considered in the competition.
By the third week of April	Finalists of the competition are chosen and informed of the need to register and present their papers at the Conference for consideration.
	Chair of the Committee to inform the Conference Chair of the finalists' names that need banquet tickets as the award winners and/or honorable mentions are announced at the Banquet. These finalists are always invited to the Banquet, whether other students are attending the Banquet or not.
At least two weeks before the Conference	The Committee Chair to inform the Administrative Coordinator of the names of the finalists. Where appropriate, the Committee Chair should request the French version of the certificate.
	The administrative coordinator to prepare certificate templates for finalists and sends them to the committee chair for review.
	Administrative coordinator to get finalists' certificates to the Local Conference Chair by hand delivery or by sending by priority post.
During the Conference	Committee members listen to the presentations and choose winners and/or honorable mentions for each category.
	Immediately following the decision by the Committee, the Committee Chair communicates the results of the competition to the CORS Secretary for inclusion in the Awards Banquet slides.
	Finalists, winners, and/or honorable mentions are announced during the Awards Banquet, and finalists' certificates are received.
Before the end of June	Committee Chair to submit the list of winners, description, and/or abstract of winning papers to the bulletin for publication in the post-conference issue and on the CORS website.
	The administrative coordinator to mail winner and honorable mention certificates to each member of the winning teams.
	Administrative coordinator to send names, addresses, and amounts of financial awards to the treasurer
	Treasurer sends payments to awardees.



# CORS Student Chapter Recognition

## Description

Every year, CORS recognizes the contributions of active CORS student chapters in serving the Society through certificates at bronze, silver, or gold levels. These certificates recognize the efforts of the members of the student chapters in promoting operations research in the student membership by organizing events related to the scope of CORS, both at the local and national levels. Awardees will be acknowledged during the annual CORS Conference, and certificates will be awarded to successful chapters.

## Eligibility

- Any official student chapter of CORS can apply to receive recognition at the appropriate level.
- The application must be submitted by the President of the local student chapter.

**Application deadline:** March 31

## Application Process

Student chapters submit an application package to the Chair of the Awards Committee of the CORS council: [vicepresident@cors.ca](mailto:vicepresident@cors.ca)

## Entry Requirements

The application package must include:

- The names and roles of the executive committee of the student chapter
- The names of all student members of the chapters during the application year
- A copy of any up-to-date chapter documentation (e.g., bylaws)
- A brief report (maximum two pages) outlining the activities held by the student chapter during the application year. Only Chapter activities during the current fiscal year (April 1 to March 31) will be considered.
- A letter of support from the faculty advisor of the student chapter.

## Selection Criteria:

The CORS Student Chapter Recognition is non-competitive, and three levels of certificates will be issued to qualifying chapters based on the following criteria:

- **Bronze level:** for demonstration of an active and growing student chapter
- **Silver level:** for continuing contribution to the local chapter through multiple local events per year
- **Gold level:** for exemplary contribution to the local chapter and broader CORS society



## CORS Student Member Leadership Award

### Description

Every year, CORS recognizes the outstanding service contributions of individual CORS student members to their local student chapter and the Society. This award is a showcase of exemplary dedication to promoting the field of operations research and the CORS society. Awardees will be acknowledged during the Annual CORS Conference.

### Eligibility

- Any student member of CORS can be nominated for this award (undergraduate or graduate students or post-doctoral fellows).
- Self-nominations are welcome.
- Previous winners are not eligible.

**Nomination deadline:** March 31

### Nomination Process

Nominations should include the candidate's name, activities, positions, and duration of service. The Awards Committee will evaluate the submissions and bring forward potential recipients to the Council for approval. Nominations outlining the contributions of the student member are sent to the Chair of the Awards Committee of the CORS council: [vicepresident@cors.ca](mailto:vicepresident@cors.ca)

### Selection Criteria

Nominees are evaluated based on their contributions to the CORS society and/or local student chapters. Most significant service includes contributions made during their term as a student CORS councillor and/or serving on the executive committee of an active student chapter.

### Award:

- The winner receives \$200 and a certificate at the Annual CORS Conference.
- The Awards Committee reserves the right not to name any winners.

# Equity, Diversity, and Inclusion (EDI) Excellence Award

## Description

This award recognizes individuals, groups, or initiatives demonstrating outstanding commitment and achievements in advancing equity, diversity, and inclusion within CORS. The EDI Excellence Award is designed to honor those who have gone above and beyond to create a more inclusive and equitable environment for all members of the Society.

## Eligibility Criteria

- Open to individuals or groups within CORS (nominated or self-nominated).
- Applicants must have made notable contributions to advancing equity, diversity, and inclusion within CORS.

## Award Categories

**Individual/Group Excellence:** Recognizing an individual or group of individuals who have shown exceptional dedication to promoting equity, diversity, and inclusion.

**Application Deadline:** Feb 28

## Application Guidelines

- Submissions should be concise, focusing on key achievements.
- Interested applicants should complete the application form.
- Interested applicants should submit a two-page<sup>1</sup> application letter that includes the following information:
  - Provide a detailed description of the applicant's contributions to EDI.
  - Highlight specific achievements, initiatives, or strategies employed to foster an inclusive environment.
  - Include supporting evidence such as testimonials, impact metrics, and relevant documentation.

## Selection Process

CORS EDI committee will evaluate all applications. Applications will be assessed based on the significance of impact, innovation, sustainability, and collaboration. Award recipients will be notified via email and announced at the CORS annual conference.

## Recognition

Award recipients will receive a distinguished certificate and a \$500 award honoring their achievement.

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<sup>1</sup> Proposals written in French will be allowed to submit an additional half page, "in support of evidence demonstrating that French documents require approximately 20% more space than similar English documents. (ref: <https://cihr-irsc.gc.ca/e/29300.html>)"

## Equity, Diversity, and Inclusion (EDI) Event Fund

### Description

The EDI Event Fund aims to empower initiatives that foster a more inclusive and equitable environment within the CORS community. This fund is designed to support individuals, groups, and organizations in creating events that actively promote and celebrate equity, diversity, and inclusion within our community.

The EDI Fund encourages and supports events that:

- Raise awareness about the importance of diversity, equity, and inclusion.
- Create platforms for underrepresented voices and communities to be heard.
- Educate and engage the community in constructive conversations around EDI topics.
- Celebrate and showcase diverse cultures, perspectives, and experiences.

This event could be applied to any community (e.g., Indigenous community) at different levels (e.g., University, sections, SIGs, etc.) within CORS.

### Eligibility

Individuals and groups within CORS are eligible to apply.

**Fund Amount:** Up to \$1000 will be awarded to selected proposals.

**Application Deadline:** December 31

**Timeline:** Proposed events must occur between January 1 and May 30.

### Evaluation Criteria

Proposals will be evaluated based on their alignment with EDI and CORS goals, innovation, impact, feasibility, and community engagement.


### Application Guidelines

Interested applicants should submit a two-page<sup>1</sup> application letter that includes the following information:

- **Event Overview:** A brief description of the event, including its objectives, format, and intended outcomes.
- **Equity, Diversity, and Inclusion Focus:** Clearly outline how the event aligns with EDI principles and contributes to creating a more inclusive environment.
- **Target Audience:** Identify the intended audience for the event and explain how it will be accessible and inclusive to diverse participants.
- **Event Agenda:** Provide a detailed agenda or program outline, including speakers, workshops, activities, and any interactive components.

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<sup>1</sup> Proposals written in French will be allowed to submit an additional half page, "in support of evidence demonstrating that French documents require approximately 20% more space than similar English documents. (ref: <https://cihr-irsc.gc.ca/e/29300.html>)"

- 
- **Budget:** Breakdown of how the grant funds will be utilized, including expenses for venue, materials, speakers, promotion, and other relevant costs.
  - **Community Impact:** Describe the expected impact of the event on the community, such as any anticipated outcomes, learning experiences, or changes in perspectives.

**Application Process**

Applicants must submit an application package to the CORS secretary ([secretary@cors.ca](mailto:secretary@cors.ca)) and CORS President ([president@cors.ca](mailto:president@cors.ca)).





# CORS DIPLOMA

## The CORS Diploma Program

Last Revised: Based on discussion by Council at its meeting on June 10, 2020. Revised: February 1, 2018

### Description

The CORS Diploma is awarded by the Canadian Operational Research Society, in association with participating Canadian universities, to recognize CORS members who have successfully completed a program of study that has included significant exposure to operational research in the following areas: OR techniques, probability and statistics, computers and systems, and applications of OR. Specific program criteria are outlined below. The objective of the Diploma is to encourage students to pursue an educational program in the field of operational research and to recognize their achievement in successfully completing such a program. It benefits the university by highlighting the fact that a student can gain significant exposure to operational research through a particular course of study offered at that University. It benefits CORS by encouraging students to pursue a career in OR and attracting new members.

### Eligibility

A candidate must be a student member or a full member of CORS to receive the Diploma. The minimum requirements are a 70 average in the 100-point grading system and a B- average in the letter grading system (or equivalent in other systems). This average is to be computed based on the courses that make up the CORS diploma program in a particular university. The participating universities can set higher standards.

### Program requirements

The study program must cover four broad areas, as outlined below. At least seven courses must comprise the program, where a course is defined approximately as three hours of instruction per week over a semester of 12–13 weeks. This is not a rigid program of study. It is expected to vary somewhat between universities. While the number of courses in each area is not dictated to provide flexibility, most programs are expected to satisfy Area 1 and Area 2 requirements with two (or more) courses each. Areas 3 and 4 do not require a dedicated course as long as the material is adequately covered throughout the program.

### Area 1: Operational Research Techniques

This area consists of the technical skills of operational research. It requires coverage of all of:

- Linear programming
- Simulation
- Decision analysis

and at least three of:

- Dynamic programming
- Integer programming
- Nonlinear programming
- Heuristic optimization
- Queueing
- Production/Inventory

- Project management
- Scheduling
- Facility location/layout
- Supply chain management/logistics

The program should give broad exposure to operational research, similar to the coverage of the major textbooks in the field.

### **Area 2: Probability and Statistics**

This area consists of basic techniques in probability and statistics. It requires coverage of:

- Random variates and distributions,
- Estimation and hypothesis testing, and
- Regression

and at least two of:

- Analysis of Variance,
- Stochastic processes (Markov processes, renewal processes, or semi-Markovian queueing),
- Statistical testing (parametric and non-parametric),
- Quality control and reliability, and
- Time series (or other forecasting models).

### **Area 3: Computers and Systems**

This area consists of the basic computer science tools used in operational research. It requires coverage of:

- Basic computer tools (such as spreadsheets, database management systems, and statistical analysis packages).
- Basic computer programming in any language (including but not limited to FORTRAN, BASIC, C, C++, Pascal, VB).

As well, exposure to one or more of the following is strongly encouraged:

- Management information systems
- Geographic information systems
- Decision support systems
- Expert systems
- Artificial intelligence

### **Area 4: Applications of Operational Research**

This area is designed to give exposure to the application of operational research in various settings. It could consist of project courses, seminars, or workshops in addition to standard means of course delivery. It could also be met by work experience (provided it was properly documented). It should illustrate the scientific method in problem-solving and discuss modeling issues such as data collection, model generation and revision, solution, implementation, verification, and validation. Functional areas include accounting, actuarial science, finance, logistics, marketing, operations, production, strategic planning, and transportation. The focus might be on a particular sector, such as agriculture, defence, government services, health care, manufacturing, or natural resources, or it could consist of a broad survey of applications.

## Application Process

To apply for the CORS Diploma, candidates must provide transcripts of their academic record (in English or French) to the CORS Diploma contact person at the University from which they graduated. The application includes a form that is added to the transcript. Graduates of non-Canadian universities or a Canadian university that does not have a Diploma Contact Person should contact the National CORS Diploma Coordinator. The university contact person will review the submitted course list and ascertain whether the candidate satisfies diploma requirements. Both positive and negative recommendations need to be sent to the National CORS Diploma Coordinator. Once satisfied, the candidate's name will be forwarded to the National Coordinator with a recommendation for the issuance of the Diploma. At the direction of the National Coordinator, the CORS Administrative Coordinator will issue and transmit the Diploma to the recipient. All the CORS diploma requests will be handled by the Local Coordinators, and their decisions are final. The National Coordinator will intervene only if (a) the Local Coordinator is not available or (b) there is a disagreement with the decision of the Local Coordinator. In such cases, the applying member can contact the National Coordinator. However, all correspondence should be copied (cc) to the Local Coordinator. The National Coordinator and the Local Coordinator should discuss the matter and inform the applying member of the final decision. If there is disagreement between the National Coordinator and the Local Coordinator, the National Coordinator's decision takes precedence.

## Administration of the CORS Diploma

**CORS National Diploma Coordinator:** The CORS Diploma is administered by the Chair of the Education Committee, who assumes the role of National Diploma Coordinator.

### Specific Duties and Responsibilities

- Define the requirements for the Diploma in broad terms.
- Advise the CORS Council on the policies and procedures for the CORS Diploma program.
- Promote the CORS Diploma program in the Canadian OR community and ensure that as many universities as possible participate.
- Review the course list of participating institutions and ensure that all CORS Diploma program requirements are met.
- Maintain regular contact with the University Diploma Coordinators, work with them to manage their programs, and remind them to submit lists of qualified diploma candidates.
- Act as the Diploma Coordinator for graduates of a non-Canadian university or a Canadian university that does not have a Diploma Contact Person.
- Transmit the names of qualifying Diploma recipients to the CORS Administrative Coordinator.
- Provide the CORS Secretary with year-end summary statistics for the CORS Diploma program and a report at the year-end CORS Council meeting.

**University Diploma Coordinator:** The University Diploma Coordinator is the contact person for the CORS Diploma program at their institution. They are members of CORS with minimum 2-3 years of teaching and/or research experience in the field of operations research. This person will be an ad hoc member of the CORS Education Committee and report to the Council through this Committee.

### **Specific Duties and Responsibilities**

- Maintain contact with the CORS Council through the National Diploma Coordinator. This will also entail advising the CORS Council on appropriate policies, definitions, and standards for the CORS Diploma.
- Define the precise courses making up the Diploma program at their institution, establish standards of achievement required for the awarding of the Diploma, and ensure the overall quality of the program delivered at their university.
- In consultation with the CORS Diploma Coordinator, the University Diploma Coordinator will prepare a list of courses that they believe contribute to the course requirements for the Diploma. For each course, the University Contact Person should indicate the number of hours pertaining to the program and how these should be allocated to the broad areas of study established by CORS. This course list may be more than the minimum number of required courses. Note that not all students at a given university will necessarily take exactly the same courses.
- Identify students in the Diploma program.
- Notify the CORS National Coordinator when students have completed the requirements for the Diploma and provide the name of the recipient as it should appear on the Diploma, the preferred language for the Diploma (English or French), and whether the Diploma is to be mailed directly to the recipient or the University Coordinator.
- Distribute the Diplomas to recipients. CORS encourages the University Diploma Coordinator to present the Diplomas to the students during (or shortly before or after) the convocation ceremonies. While each University has a different graduation ceremony, which may be impossible in some institutions, CORS views it desirable to honour the CORS Diploma recipients publicly.

### **CORS Administrative Coordinator**

#### **Specific Duties and Responsibilities**

- Confirm that the diploma recipient is a member of the Society.
- Produce and mail the Diplomas using the electronic signatures of the CORS President and the National Coordinator.
- Maintain the CORS Diploma web pages on the CORS website.



# CORS SPONSORSHIP AND FUNDING

## Graduate Student Funding to Attend CORS Conferences

Revised: March 2022 to remove SSHRC funding from competition. As a result of a motion on September 16, 2022, graduate student funding be given as an award instead of a reimbursement.

### Description

CORS partially funds graduate students attending CORS annual meetings.

### Eligibility

The candidate must:

- Be a Student Member of CORS.
- Be enrolled in a graduate program in a field related to operational research.
- Be studying at a Canadian university or be a Canadian citizen or permanent resident studying abroad.
- Attend the Conference and present their registration receipt to receive any funding.

### Selection Considerations

The following criteria are to be used to determine the amount awarded to each eligible applicant:

- Whether the applicant is presenting a paper at the Conference.
- Travel cost from the student's home city to the Conference.

### Application Process

The application form for funding is available on the CORS website. Applications must be received at least two months before the conference date to receive full consideration. The specific date will be published in the February Bulletin each year. Applicants who meet this deadline will be notified at least one month before the conference date whether their application was successful.

### Administration of Funding

The CORS Education Chair determines who will receive funding and the amount of the Award. The Education Chair sends the list of recipients with funding amounts to the CORS Treasurer. The CORS Treasurer administers the distribution of funds after receiving confirmation that the student attended the Conference.

### Reimbursement Process

Students must submit proof they attended the Conference (e.g., boarding pass, selfie at the conference site) within 30 days of the annual CORS/SCRO conference to [treasurer@cors.ca](mailto:treasurer@cors.ca) and MUST copy their supervisors on the email. The email to the treasurer must include the full legal name and full current address of residence, as well as a reference to graduate student funding for attending the Conference.

The CORS/SCRO Treasurer administers the distribution of funds after receiving confirmation that the student attended the Conference and will notify the student's supervisor.



## Traveling Speakers Program

Last Revised: November 29, 2019 (section president makes request). Revised: November 29, 2013 (expense claim process added). Revised: January 24, 2011 (administration added).

### Description

The Traveling Speakers Program (TSP) enables local sections to bring OR practitioners and researchers in Canada as speakers to their local events.

### Administration

The Immediate Past President acts as the Traveling Speakers Program coordinator.

### Program Details

To keep costs in line while maximizing the CORS National profile, CORS sponsorship will be limited to 50% of the total expenses, up to a maximum of \$500 per speaker or \$1000 for a single event (Conference, workshop). Other expenses can be covered by the local section. The event program must acknowledge the contribution of CORS. The President of the local section must contact the TSP Coordinator to obtain approval for funding at least one month before the event date.

The CORS Treasurer will make payment upon receipt of the Expense Form (<https://www.cors.ca/sites/default/files/documents/expenses.pdf>).

The local section president fills out the application form (<https://www.cors.ca/sites/default/files/documents/tsp.pdf>) and submits the form to the TSP Coordinator.

# CORS POLICIES

## Notes concerning Bylaw interpretations

This section contains notes about Bylaw interpretations that may be required to operate the Society in contemporary times using Bylaws that were written at the foundation of CORS.

The constitution lists only Local Sections and doesn't refer to Student Chapters. It is understood that all Bylaws relating to Local Sections also apply to Student Chapters.

## Policies Relating to Membership

### Invoicing of the Membership Timeline

October 1	Website ready to accept renewal or new membership applications for the upcoming membership year. A message sent out via the Mailing List advising members that the site is open for those who wish to submit before year end.
January 15	Reminder notices for the upcoming membership year for those who have not paid are sent via email with a due date of April 1.
February 15	Notice sent via Mailing List reminding members that membership fees are due on April 1 (and thanking those who have already submitted). The message should include the information on how to do this with the appropriate links to the website and could be combined with a reminder about the Conference and that members get a discount.
March 15	Message sent via email to those members who have not yet paid reminding them that we have not yet received their membership fees.
April 1	Due date for payment of membership fees for current year. Members not renewing by this date are considered overdue.
April 15	Reminder message sent via email to those who have not yet paid, reminding them that the fees are overdue.
May 15	Reminder message sent via email to those who have not yet paid.
June 15	Reminder message sent via email to those who have not yet paid.
July 15	Reminder message sent via email to those who have not yet paid.
August 1	Reminder message from the CORS President for those who wish to continue membership in CORS, or a "sorry to see you go" message to those who do not.
August 15	Send a list of overdue members to Section and Chapter Presidents (or alternate) for their review. Individual members should be contacted where warranted.
October 1	Memberships of those 6 months overdue are automatically discontinued.



## Emeritus Members

Last Revised: Based on a motion passed by the Council at its meeting on November 26, 2004.

The CORS **Emeritus** membership designation is to be given to those retired CORS members who have received the *CORS Service Award* and the *CORS Award of Merit*. A CORS **Emeritus** member is awarded a complimentary lifetime membership with all regular membership benefits, including a subscription to INFOR Journal and the CORS-SCRO Bulletin, access to the Online Membership Directory, and notices of OR activities across the country and in local sections.



## Local Sections and Chapters' Budgets

Last Revised: Based on a motion passed by the Council at its meeting on November 18, 2022.

At the November 2022 Council meeting, as instructed by the accounting firm retained to design the CORS accounting system in 2022-2023, the Council voted a motion for the treasurer to initiate the process of transitioning all local sections and student chapters' bank finance to the CORS central treasury. Bylaw 11 only states that local sections are funded by a dues-sharing arrangement, not that they have their own bank accounts.

### General Statement

Sections do not generate revenue from their operations. Thus, funding for local sections flows from the national executive to the local section. Local sections and chapters are prohibited from holding money in their own bank accounts.

### Policies

Sections and Student Chapters are entitled to a budgeted amount based on a formula that considers:

- a total budget allocation to all sections and student chapters,
- a fixed amount per section and student chapters,
- a variable amount per membership summed across all sections and student chapters.


$$B_{total} = |G|a_G + |M|a_M$$

Where

- $B_{total}$  is the total budget allocated to group activities;
- $|G|$  is the cardinality of the set of groups  $G$ ;
- $|M|$  is the cardinality of the set of members  $M$ ;
- $a_G$  is the amount allocated to each group  $g \in G$ ;
- $a_M$  is amount allocated to each member  $m \in M$ ;

To access their budget allocation, section/chapter members must submit expense reimbursement claims to the CORS Treasurer (using the standard CORS expense claim process; see [Guidelines for CORS Reimbursements](#)).

The expense claims must be submitted via email to the CORS Treasurer ([treasurer@cors.ca](mailto:treasurer@cors.ca)) and CC the section/chapter president (to confirm that section/chapter leadership has authorized this claim against their annual section/chapter budget). Only eligible expenses will be reimbursed. Eligible expenses follow the tri-agency policies.



If in doubt about the eligibility of specific expenses for reimbursement under section/chapter annual budgets, section/chapter leadership should consult the CORS Treasurer before one of their members incurs the (potentially ineligible) expense.

Budget allocations are not carried over across fiscal years.

### **Relevant Motions of Council**

**1996 AGM:** At the 1996 Annual General Meeting, a motion was presented to change the allocation of the dues to the local sections. As required, a vote was taken by mail ballot. Unfortunately, even though the motion passed by a wide margin, the result cannot be accepted. The ballot incorrectly stated that the local section would collect 5%, rather than 15% of the dues after the first \$1,000. While the vote will be redone after the 1997 A.G.M., Council passed the following motion to implement the change for 1996–97: "As per the Constitution, the 1996–97 local section dues allocation shall be 20%. In cases where the local section would have received more under the formula proposed at the 1996 A.G.M., a special one-time section incentive will be awarded equal to the difference, provided that the local section fulfills the requirements for dues allocation."

**November 30, 2007:** The procedure for allocating section shares of dues will be changed. (Blake, Gendron)

**May 12, 2008:** Formalization of the administrative process for distributing unclaimed section dues.

**November 18, 2022:** At the Council meeting of November 18, 2022, as instructed by the accounting firm retained for the design of the CORS accounting system in 2022-2023, Council voted a motion for the treasurer to initiate the process of transitioning all local sections and student chapters bank finance to the CORS central treasury. Bylaw 11 only states that local sections get funded by a dues sharing arrangement, not that they have their own bank accounts.

## Use of the CORS Mailing List

Last Revised: May 17, 2004, Adopted in Banff. November 25, 2006, Change in fee schedule. No fee for the distribution of Job Postings submitted by CORS members.

### The Mailing List will only be used for the following purposes:

1. To transmit messages regarding the activities and business of the Society as requested by the President, vice-president, Past President, treasurer, or secretary.
2. To transmit the bulletin and requests from the Editor for submissions to the bulletin.
3. To transmit information as required for the Administrative Coordinator and management. This includes requests from the executive of local sections to send notices to targeted groups within CORS, for example, to local section members.
4. To transmit announcements about conferences, conference sessions, and special journal issues as requested by paid members of CORS, provided that the activities are related to Operational Research in its broadest sense.
5. Job Ads of general interest to CORS Members.
6. Commercial Ads of general interest CORS Members

### Fees for Mailing List use

1. There is no charge for items 1, 2, 3, and 4.
2. There is no charge for item 5 if submitted by a paid member of CORS; otherwise, the cost is one-half the cost of a bulletin ad, but it is free if it appears as a paid ad in the bulletin.
3. The cost of six is equal to the cost of a Bulletin ad but free if it appears as a paid ad in the bulletin.

### Responsibilities

1. Items 1, 2, and 3 are the responsibility of the Administrative Coordinator under the existing agreement. Items 4 and 5 (if submitted by a paid CORS member) will be performed as an additional service at no charge, but the amount of activity will be monitored.
2. Items 5 and 6 are the responsibility of the Administrative Coordinator.



## Guidelines for CORS Reimbursements

This policy sets guidelines for how a person can request reimbursements from CORS. These reimbursements will typically be related to involvement with CORS council meetings, the Traveling Speakers Program, or the annual Conference. Given that it is hard to have guidelines encompassing all circumstances, the following guidelines are formed around the understanding that a person requiring reimbursement from CORS would bill for reasonable expenses. Reimbursement for any items not specified in these guidelines should be done following tri-agency reimbursement guidelines.

### **Council Meetings**

CORS covers the expenses of CORS Councillors for the annual in-person Council meetings. Expenses to attend the Council meetings held as part of the CORS National Conference and the AGM are only covered if the member cannot fund their own travel to the Conference.

### **Receipts**

Travel and accommodation expenses should be reasonable in nature and amount and properly supported by original receipts, except for private vehicle allowances.

### **Eligible Accommodation Expenses**

Reimbursement is limited to a single room rate per traveler. When room cancellation is necessary, the traveler must ensure that this is done in advance so that no penalties are incurred.

### **Eligible Travel Expenses**

Travelers are encouraged to find the lowest available fare. Unless accompanied by a medical certificate, first or business-class tickets will only be reimbursed at the coach/economy level. Travelers who use their private vehicles will be reimbursed at a kilometer allowance rate based on the rate used at their institution.

### **Eligible Meal Expenses**

Travelers will be reimbursed for reasonable meals. Travelers may either submit original receipts or use a per diem rate equal to those used at their institutions.



## Special Interest Group (SIG) Policy

Last Revised: Based on a motion passed by the Council at its meeting on August 19, 2011.

CORS encourages members with a common interest in an area within or related to operational research to form a CORS Special Interest Group (SIG). A SIG provides a mechanism to promote CORS, the SIG area, and the SIG members, as well as the opportunity for CORS members with common interests to interact and network. CORS will act as a facilitator to help achieve these goals.

### Formation of a SIG

A CORS SIG can be formed if a letter addressed to the CORS president, signed by at least 25 CORS members, is submitted to the CORS Council detailing:

- The SIG's main research interest(s).
- The SIG's name.
- The twenty-five founding members.
- The President of the SIG and any other executive positions or administrative structure agreed upon among the SIG members.

The SIG commits to:

- Strive to keep membership at a minimum of twenty-five members.
- Restrict membership to CORS members.
- Organize a stream of talks at each CORS annual conference.
- Meet at least once a year, preferably at the CORS annual conference.
- Provide a report on the SIG's activities during the preceding year, preferably through a newsletter submitted to the CORS Bulletin.

### CORS Approval and Commitment

The CORS Council, upon determining that the SIG's focus area is appropriate for a CORS SIG, approves the formation of the SIG. Electronic signatures, such as email messages, are acceptable.

CORS commits to:

- Assist each CORS SIG by administering a dedicated Mailing List.
- Provide a room for a SIG meeting at the CORS Annual Meeting.
- Collect information about SIG membership when CORS members renew their membership information.
- Publish SIG membership information in the CORS membership directory.
- Promote SIG activities by providing information about SIGs and SIG-organized events on the CORS website.

### Termination

CORS will consider terminating a SIG if it fails to meet any of the abovementioned requirements for two consecutive years. The CORS president will send a termination letter to the SIG president.

## **SIG Funding Policy**

As a result of a motion on September 16, 2022, CORS/SCRO allocates \$1,000 annually to each Special Interest Group according to the following policy. Note that this funding is in addition to funding provided to SIG student competition winners.

### **Objective**

The SIG Funding policy aims to provide financial support to CORS/SCRO SIGs to undertake activities that will strengthen the SIG communities and the overall CORS/SCRO community. These activities should be open to all SIG members, and reasonable efforts should be made to ensure maximum participation. When possible, CORS/SCRO members interested in the SIG should be included even if they are not currently SIG members. To support the activities of CORS/SCRO SIGs and to allow SIGs to provide hospitality at events, CORS/SCRO will allocate \$1,000 per year to each SIG. The funding must be spent during the fiscal year, and leftover funds will not be carried forward to the next fiscal year. The event must acknowledge the contribution of CORS/SCRO.

### **Expenses**

SIG expenses must follow tri-agency policies. Example eligible expenses include:

- Hospitality during SIG meetings at the annual Conference (Coffee and cookies, Wine and cheese, light meals, etc.)
- SIG Conference or workshop expenses (hospitality, guest speakers, venues, equipment, etc.)
- Outreach, education, and recruitment efforts related to the SIG focus.

Ineligible expenses include:

- Stipends or honorariums unless the honorarium is being offered in accordance with tri agency honorarium policies.

If in doubt about eligible expenses, please email [treasurer@cors.ca](mailto:treasurer@cors.ca)

### **Claims Process**

To simplify this process's management and avoid the need for SIGs to open bank accounts, the allocated funds will remain in the central CORS/SCRO bank account. To claim this funding and be reimbursed for money spent by a SIG member, submit receipts and the Expense Reimbursement Form ([www.cors.ca](http://www.cors.ca)) to [treasurer@cors.ca](mailto:treasurer@cors.ca). If the funds are used for hospitality during the CORS/SCRO annual meeting, the expenses may be paid directly by CORS/SCRO to the conference organizers. In this case, contact [treasurer@cors.ca](mailto:treasurer@cors.ca) and the conference chair. The deadline to submit expenses is March 1 of the current fiscal year.

### **SIG funding to support their student paper competitions:**

- Each SIG is provided a budget to Award prizes of \$200 for the winner and \$50 for an honorable mention for their annual student paper competition.
- Contact the CORS Treasurer with the legal name and full current address of residence for the winner and honorable mention that are being awarded the monetary prizes.
- If the student paper competition includes a presentation at the annual Conference, contact the conference program chair to have a session added to the Conference for the student paper competition. The student paper competition session must be completed before the Banquet, ideally by early Tuesday afternoon, the day of the Banquet.



## Guidelines for Establishing a New Local Section

Last Revised: Based on a motion passed by the Council at its meeting on November 19, 2021.

### General Information:

- Name and email address of the person submitting the application
- Indication whether this is a new or reactivation application
- If new: the region that is seeking to form a new section
- If new: proposed name of the section.
- If reactivation: name of the section.

### Additional information:

- Local Section Officers: President (name, email, phone number, address, title); Vice-President (name); Secretary (name); Treasurer (name)
- Petition: A petition signed by twenty-five or more interested CORS members in good standing
- Local Section Bylaws: Prepare a set of bylaws to govern your Local Section. Here is an example that can be used as a template: <http://www.cors.ca/Section/Calgary/?q=content/constitution>
- Local section management must be in line with Bylaw No. 11 (Local Sections) and Bylaw No. 12 (Management of Local Sections) from the CORS Constitution (<https://www.cors.ca/content/library>).

## Guidelines for Establishing a New Student Chapter

Last Revised: Based on a discussion by the Council at its meeting on January 26, 2024.

All student chapters need to have a structure such as described below, and this information needs to be available on their website. Email [info@cors.ca](mailto:info@cors.ca) to inform the Administrative Coordinator of changes in chapter officers.

### The process to start a new Student Chapter requires the following information:

#### General Information:

- Name of University and department
- Name and email address of the person submitting the application
- Indication whether it is a new or reactivation application
- Department website link
- Faculty Advisor name
- Faculty Advisor email address
- Faculty Advisor title

#### Additional information:

- Chapter Officers: Faculty Advisor, President, Vice-President, Secretary, Treasurer
- Petition: A petition signed by ten or more interested CORS members in good standing. The faculty advisor and the petitioning officers should sign the letter of petition.
- Chapter Bylaws: Prepare a set of bylaws to govern your Student Chapter. Here is an example that can be used as a template: (<https://org.mie.utoronto.ca/bylaws>)
- All student chapters must identify a faculty advisor.