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INTRODUCTION

Geographic chapters are an important component of a large national (and increasingly, international) association like INFORMS. Local groups make it possible to maintain a close, regular association with professional colleagues in the same city or geographic area. Networking, professional dialogue, and defining operations research and the management sciences for INFORMS members and the general public are all activities that take place intensely within chapters. It is within Chapters that practitioners and theorists can meet frequently and forge intellectual connections that lead to publications, job opportunities, consulting relationships, internships, and personal friendships.

As the national organization has grown, geographic chapters have become increasingly important to INFORMS and its membership. Obviously, having a larger number of members nationally mean that there are more people involved in OR/MS at local levels, more students preparing to enter the field, and that there is a greater need for formal and informal communication networks. This handbook provides information to help INFORMS members organize, govern, and sustain the operation of local chapter organizations.

SECTION I: ORGANIZING A CHAPTER

Establishing a New Chapter

The requirements set by INFORMS for chapter formation are:

1. A slate of officers (interim or full term) and the provision of their names and addresses on a letter of petition.
2. A petition signed by 25 or more interested INFORMS members in good standing.
3. A set of Chapter Bylaws adopted by the interested members and approved by the Chapters/Fora Committee of the Subdivisions Council of INFORMS.
4. For any chapter being established in a country where there is a national society that is a member of the International Federation of Operational Research Societies (IFORS), the petition to INFORMS shall include a letter of support from the local IFORS member society.
5. Approval of the application by the Subdivisions Council of INFORMS.
6. International chapters also require approval of the application by the INFORMS Board.

The Chapters/Fora Committee stands ready to help you establish a new chapter of INFORMS and will guide you through the process. Funds can be advanced for organizational purposes where needed. INFORMS also maintains a full-time, professional staff that is dedicated to supporting your efforts. The first step in organizing a new chapter is often to contact the Director of Subdivision Services at (800) 4-INFORMS or mailto:subdivision.services@informs.org.
Potential chapter members can be identified through the INFORMS Business Office. The Business Office will provide you with an electronic list of names, addresses, e-mail addresses, and telephone numbers, defined by the zip codes or states from which your chapter may attract members. The INFORMS Online Membership Directory, updated biweekly, is another tool to help locate professional colleagues in your area, and also lists telephone numbers and electronic mail addresses. Once 25 members of INFORMS in good standing have made a commitment to establish a new chapter by signing the establishing petition, officers can be selected and bylaws written and developed.

It is important to give careful consideration to an appropriate name for the chapter. The name should be short and clear so that potential members will recognize it immediately when they see notices in the communications of INFORMS or hear reference made to the chapter. Normally, the name of the city that is centrally located in the chapter's area is selected as the name of the chapter. Alternatively, an appropriate acronym of the name may be useful for recognition purposes. In forming a new chapter, it is generally desirable to restrict its geographical coverage to an area in which members can conveniently travel to take part in chapter activities.

There are also responsibilities accompanying the privileges of being an INFORMS chapter. This manual describes those privileges and responsibilities defined by the INFORMS Bylaws and by the Policies and Procedures of the INFORMS Board.

Reactivating an Existing Chapter

Sometimes chartered chapters fall into inactivity. Provided the Subdivisions Council has not deactivated the chapter, revitalizing it is a fairly simple process organizationally. No new petition needs to be filed and the new group can adopt the existing bylaws without renewed approval from the Subdivisions Council of INFORMS (changes to the bylaws whenever made must be reviewed and approved by the Council). INFORMS recommends that a reactivated chapter have a minimum of 25 INFORMS members but does not require this unless the chapter bylaws so stipulate; also, the local chapter members may, but are not required to be, members of the national organization provided the officers are members of INFORMS. As with all subdivisions, chapter officers must be members of national INFORMS.

SECTION II: CHAPTER GOVERNANCE

Responsibilities of the Chapter

Chapters are responsible for maintaining a level and quality of activity that will properly serve the INFORMS membership in their area. They are also responsible for reporting changes in officers as they occur and, under certain conditions set forth below, for annually reporting the chapter's financial status to fulfill IRS requirements. A chapter must hold at least one business meeting and at least one professional meeting each year. Typically, chapters hold about six to nine professional meetings annually.
Many chapters find it possible to hold meetings every month. Twice yearly the Business Office will furnish chapters with a roster of all chapter members, including those who are not members of the national organization of INFORMS, who have paid dues to the national office. The chapter is also required to furnish the Business Office with names, addresses, telephone numbers and e-mail addresses for members who have paid dues to the local chapter so that they may be included in INFORMS records.

Each chapter must be recertified each year, as an indication that the chapter was active during the past year and that its activities were in conformance with national and chapter bylaws and in accordance with the Policies and Procedures of INFORMS. The Chapter Activity Report (See Appendix C), available on INFORMS Online, must be submitted to the Business Office within 31 days of the end of each calendar year so that this recertification can proceed.

All new chapters are required to maintain their financial accounts through the INFORMS Business Office. Some existing chapters maintain local INFORMS bank accounts along with accounts maintained by the Business Office. For these local accounts the chapter must report to the INFORMS auditor by returning the audit letter mailed to the chapter treasurer. These chapters are also required to submit a copy of the year-end bank account statement to the Director of Subdivision Services by the end of January.

Responsibilities of Officers

Chapter officers are responsible to their membership and to the national organization of INFORMS for the prudent management of their chapter. They are charged with ensuring that the chapter operate in accordance with its bylaws and in accordance with the bylaws and written policies and procedures of INFORMS, available on INFORMS Online http://www.informs.org/. Chapter officers should periodically review this checklist:

Officers’ Checklist

1. Review the chapter bylaws; each officer should note his or her specific responsibilities. If bylaws are missing, obtain a copy from the INFORMS Business Office.
2. Review the events of the past year with your predecessor who should hand over the file of INFORMS newsletters, correspondence, and pending business. Ask for a general outline of how the chapter affairs were conducted.
3. Immediately after the election of new chapter officers, see that the Secretary notifies the INFORMS Business Office of the name, mailing address, e-mail address, and phone number of each officer. Also, check to be sure that the Business Office is on the chapter mailing list.
4. Review this Chapters Handbook for ideas to help make your term in office a success. Extra copies may be downloaded from the website INFORMS Online http://www.informs.org/.
5. Set up a plan for the year's events. Advance preparation plays a major role in the success of chapter programs:
   a. Schedule Executive Board meetings for the entire year.
b. Schedule chapter meetings for the entire year.
c. Plan speakers well in advance.
d. Plan for the next election meeting well in advance of the appointed date.
e. Check meeting dates against conferences, religious and secular holidays, academic calendars, and local events so that conflicts are minimized.
f. Assign a member of the chapter Executive Board to attend the Chapter/Fora Officers’ Breakfast at the annual meeting of INFORMS.

6. Feel free to contact the INFORMS Chapters/Fora Committee if you have any questions. Inquiries are welcome. Likewise, the Subdivisions Services Department of the Business Office is always available to you.

Responsibilities of the Subdivisions Council and the INFORMS Board of Directors

The Board of Directors of INFORMS establishes policies and maintains oversight through the Subdivisions Council, which has established the Chapters/Fora Committee with responsibility to monitor the establishment, governance, operation, and disestablishment of subdivisions uniting:

- members along geographic areas
- student members at colleges and universities
- members along geographic areas that are not located in North America (in cooperation with an existing national IFORS member), and
- members along interest areas that are neither technical nor geographic in nature.

The Committee has the following responsibilities to chapters:

1. Encourage chapters and guide their development.
   1.1 Recognize outstanding chapters and chapter volunteers.
   1.2 Manage the Moving Spirit Awards.

2. Assist members in the formation of new chapters and the reactivation of dormant chapters.

3. Monitor the health and performance of chapters. This includes taking action when subdivisions appear to be inactive or have other management difficulties.

4. Annually, recertify active chapters. This includes the solicitation and compilation of annual chapter activity reports from all INFORMS chapters. A summary of these reports must be provided to the Subdivisions Council annually.

5. Make recommendations to the INFORMS Subdivisions Council regarding the establishment, governance, operation, and disestablishment of chapters.

6. Facilitate chapters in the creation of budgets and procedures.

7. Provide advice to chapters pertaining to their activities whenever needed.

8. Inform the Subdivisions Council of chapter activities, and report on their well-being.

11. Consider any chapter business that is brought before it.

SECTION III: CHAPTER OPERATIONS

Administration and Promotion

Chapters are able to exercise a great deal of leeway in the organizational structure they design and the manner in which they administer their affairs. Chapter officers must be members of the national organization. Officer titles and functions, the length of their terms, and the frequency and type of meetings held, however, are all decisions that are made at the local level when a chapter is established. These can be changed at any time through a modification of the chapter bylaws.

With the exception of election meetings, many chapters find it possible to conduct most business in Executive Board meetings and devote general meetings to professional programs. Summaries of business conducted in Executive Board meetings should be available to the chapter membership through the chapter newsletter, brief reports at general meetings, or by other means. Business requiring membership approval (per the bylaws) can often be efficiently conducted by mail or e-mail. Care should be taken in drafting the bylaws to balance Executive Board powers with membership rights. Election meetings are normally held once a year at the time specified in the chapter bylaws and are open to the entire chapter membership. Chapter officers are elected and various annual business reports are given. Terms of officers should be arranged so that newly elected officers have sufficient time to plan chapter activities for the coming year. Communication is an important responsibility of the Executive Board, and again, style is often unique to the chapter and its members. INFORMS offers a website to each chapter and provides assistance in design and maintenance. Most chapters find e-mail to be the most convenient and effective way to contact each other. When e-mail is used for chapter business, care should be taken for summaries of votes and other business records to be entered into the minutes or official chapter record in correct form. Printed material is of course still an appropriate means of communication.

A sustained public relations effort will contribute significantly to the growth of your chapter. The best technical program is of no value without an audience. Well-planned publicity can determine the initial success or failure of your organizational campaign and can affect the health of the chapter throughout its life. Not only is publicity a useful communication tool among members, it is also an essential way for chapters to provide information about OR/MS to the community at large. Some detailed guidance for chapter public relations is provided in Appendix E.

Financial Management and Reporting

The INFORMS Business Office collects dues for the chapter (provided the chapter’s Executive Committee has decided to assess them) and pays all bills from a chapter
account maintained by the Business Office. As part of INFORMS, chapters are entitled to tax exempt status under Section 501(c)(3) of the Internal Revenue Code. Consequently, all chapters’ financial activity must be reported to the IRS under the INFORMS tax report and filed by the INFORMS Business Office. For this reason, the Board of Directors has prohibited the establishment of any new bank accounts for local chapters.

Chapters who maintained local bank accounts at the time the Board took this action now maintain them according to the following guidelines: The account belongs to INFORMS and the Executive Director of INFORMS is a signer on the account, along with approved chapter officers. The chapter officers must respond to a request from the INFORMS auditor, covering the fiscal year January 1 through December 31, when it is received. They must also submit a copy of the year-end bank statement by the end of January of the following year to the Subdivisions Services Department.

Meetings and Events

Because chapters have a great deal of freedom in scheduling meetings, both in frequency and in the kind of meetings that are held, the following section may stimulate some ideas among the Executive Board.

Program Meetings

There are two types of program meetings: dinner and non-dinner meetings. Except for the dinner, they should have the same general format: a welcoming statement, introduction of the speaker, the speech, a question and answer period, and a closing statement. Also, some chapters have luncheon meetings instead of dinner meetings, or they may have both.

The dinner meeting involves additional work on arrangements. Some things you should consider are:

1. Does the place at which you eat provide space both for the dinner and for those members who come after dinner to listen to the speaker?
2. Will you collect for the dinner in advance, at the door, or by means of online reservation services provided at minimal cost through the INFORMS Meetings Department?
3. Must reservations for dinner be guaranteed; will the chapter have to pay for those who default? (This also depends upon the restaurant's requirements.)
4. Is there a public address system available if required? Does an overhead projector need to be provided for the speaker? Is a movie screen available if needed? Is there a power outlet for a projector? Is there a board?
5. Can the club or restaurant provide for an "unannounced dinner guest?" How many?
6. Will you assess those who come after dinner to hear the speaker?
7. Will you offer students a discount on their dinners?

In terms of content, it is possible to vary program meetings almost endlessly. Here are some suggestions that have served INFORMS members well.
"Show and Tell" Meetings
These are meetings where members of the chapter are the featured speakers and where they describe what they are doing in their own work. These are often the most popular and professionally rewarding meetings of a chapter, providing a forum for the speaker to advance his ideas and to receive peer comment and criticism. It is also possible to arrange these as roundtable meetings for discussion of a particular technical area or field of application.

Meetings with Well Known Guest Speakers
Every geographical area has its share of widely known OR/MS people, and there is generally no problem in obtaining speakers of this caliber. Every so often, a chapter will want to feature a speaker who is outside its geographical area. If the chapter treasury is strong enough to pay expenses and, perhaps, an honorarium, then do so. It is often the only opportunity for chapter members to hear talks from prominent people whom they might not otherwise be able to hear and meet. Such meetings can "make" a successful chapter.

If the chapter treasury cannot bear such expense, don't give up. Universities have seminar programs, as do some large corporations, which feature prominent OR/MS people from other areas. It will often be possible to persuade such speakers to speak at a chapter meeting, either on the same day or before or after their other engagement. In this way, speaker expenses and honoraria can be avoided or at least shared. Additionally, it may be possible to feature senior speakers who are traveling in the area for business purposes. It is also possible to arrange for speakers from the INFORMS Speakers Program. Chapter Program Committee Chairs are urged to review the program on INFORMS Online http://www.informs.org/Speaker/ and to contact the INFORMS Business Office to request a speaker.

Joint Meetings
Some chapters have sponsored joint meetings with other societies, such as IEEE, SIAM, ACM, IIE, ASA, etc., that have been very successful. Sometimes joint meetings can be arranged with local student chapters, with obvious mutual benefits.

Tours for Chapter Members
Several chapters have sponsored very successful tours of plants and work sites.

Special Meetings
Many chapters hold special meetings to attract spouses and other guests of members. Many of our friends and families are professionally employed in fields where OR/MS techniques have been applied or where attempts to do so have been made. It is sometimes possible to organize a program that is very interesting to them.

Social Events
Many chapters hold occasional social events such as an "end-of-the-year" banquet or a picnic that families of members can attend. They are generally very successful.
Additionally, less formal social mixers may be held at various establishments to encourage networking opportunities.

Local Events
Chapters should be alert for opportunities to take part as an organization in events that are sponsored by local groups. Engineers Week or Career Fairs are examples.

Chapters are increasingly willing to participate in more ambitious event planning and execution. These events include the following:

Short Technical Symposia
Many chapters have held successful symposia. They are normally held annually and are one to two days in length. It is generally desirable to focus the symposium on a particular theme or subject matter area in which not only your own chapter members are interested, but also one which has strong appeal to others in related fields. Symposia dealing with applications of operations research or the management sciences to particular fields, such as marketing, finance, corporate planning, energy, etc., are often found to draw not only from the practitioner community, but also from executive and management personnel who are the "clients" of the OR/MS practitioners. In fact, symposia that include active participation in the program by "clients" of OR/MS are often among the most successful. In some cases, well-attended technical symposia that are carefully managed have been found to be effective fund-raising activities for local chapters.

Educational Programs
Chapters will often find that a need exists in their area for educational programs that are tailored to the special needs and desires of their members and potential members. Examples are:

- Refresher Courses in OR Techniques
- Techniques Applications
- Survey of State of the Art
- New Techniques

The courses serve the needs of the members and publicize the chapter and its activities. Courses can be most often given in the late afternoon or evening. A college or university faculty member can usually be found to give a course in his area of interest. Break-even enrollment will generally be found to be quite low, especially if classroom space is obtained without cost as it usually can be.

SECTION IV: CHAPTER SUPPORT

INFORMS Online and List Serves
INFORMS maintains an extensive website, INFORMS Online (IOL). There is a section of IOL called Subdivisions, where chapters may maintain their own web pages and review other chapters’ programs, meetings schedules, and membership customs. The Chapter Handbook may be downloaded from this area, as well as the most current version of the
Chapter Activity Report, application material for the Moving Spirit Award, and other forms useful to chapter officers. Within other sections of IOL chapter officers may find contact information (usually e-mail links) for members of the Chapter/Fora Committee, the Subdivision Council, and the Board of Directors of INFORMS. The constitution and bylaws of the national organization, as well as all written policies and procedures, are available at all times in their most recent, approved form on IOL. INFORMS also maintains a list serve for chapter officers at mailto:chapters@list.informs.org, where they may post information useful to other chapters or pose questions. Often symposia are reported on the list serve, including attendance, successful program strategies, and suggestions for improvement. Ideas may be exchanged for strengthening chapters, or INFORMS volunteers or staff may post news of special interest to chapters and their leaders.

Staff Resources

INFORMS maintains a professional staff of approximately 45 people in offices in Hanover, Maryland. Some of the expertise available to chapters through the Business Office includes marketing, public relations, membership development, and meetings support. The Subdivisions Services Department is the contact point for chapter inquiries, and its staff members are dedicated to providing support to develop and strengthen chapters. Here you may obtain current mailing lists, secure prompt resolution of an administrative issue, or receive experienced direction in dealing with a chapter issue. Subdivision Services personnel work closely with both the Member Services Department and the Meetings Department to insure that records are correct and that chapters may secure experienced assistance in planning symposia and other special events. The highly skilled Publications Services Department is also available to answer questions and advise chapters should the need arise.

Publications and Meetings

In addition to its prestigious journals, INFORMS produces two publications for distribution to all members. OR/MS Today is a magazine published bimonthly that contains articles and news of general interest to the entire membership of the national organization, and its editor welcomes news and photographs from chapters. Directions for submitting material to OR/MS Today can be found at http://lionhrtpub.com/orms/. For more frequent release of information, the Marketing Department of INFORMS e-mails a newsletter, E-NEWS, to all members twice each month. Here chapters often announce meetings or events of interest to an audience wider than their chapter membership. Submissions to E-NEWS are made through the Subdivisions Services Department at mailto:subdivision.services@informs.org.

National meetings are events where chapter members and leaders can meet and interact with those in other chapters to develop new ideas and strategies. The Chapters/Fora Officers’ Breakfast on Tuesday morning at 7:00 AM has become a fall meeting tradition, with as many as 100 people in attendance. Staff members and volunteers are available at
national meetings to discuss chapter issues, and staff members are often available to visit chapters at their home locations.

Awards and Prizes

Chapters are encouraged to develop local awards tied to the particular mission of the chapter. For many years INFORMS has underwritten the Moving Spirit Award, given each year to no more than three INFORMS members to recognize outstanding chapter volunteers who have been “moving spirits” in their chapters. The Moving Spirit Award is presented by the Chair of the Chapters/Fora Committee at the national meeting, and an account of the award, citation(s), recipient(s), and qualifying service is published in OR/MS Today and IOL. A complete description of the award, nomination procedures, and selection criteria is available on IOL.
APPENDIX A: Sample Petition for Chapter Charter

We, the undersigned members in good standing of INFORMS, intend to establish the __________ Chapter. We petition the Chapters/Fora Committee, the Subdivisions Council and the Board of Directors of INFORMS to recognize our chapter.

NAME (printed)  SIGNATURE

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Model Chapter Bylaws

Bylaws for the ______ Chapter

of the

Institute for Operations Research and the Management Sciences

ARTICLE I – NAME. The name of this organization shall be the ______ Chapter, hereinafter the Chapter, of the Institute for Operations Research and the Management Sciences.

ARTICLE II – PURPOSE

1. Encourage interest in the field of operations research (OR) and the management sciences (MS).

2. Provide a means of communication among people having interest in OR/MS.

3. Provide an informal means of exchange about OR/MS educational programs and opportunities.

4. Provide an informal means of sharing information about the methods and techniques of OR/MS.

5. Present a forum of speakers who address OR/MS topics.

ARTICLE III – MEMBERSHIP

1. Any persons interested in operations research and the management sciences may become a chapter member by completing a membership application and submitting it with the proper chapter dues. Membership in the national INFORMS organization (the Institute) is not required.

2. With the exception that elected officers must be members of INFORMS, all members have equal rights, duties, and privileges. Annual chapter dues are normally payable at the beginning of each calendar year.

3. Membership and participation shall be free from discrimination on any basis.

4. At all times, the membership of the Chapter must include at least 25 members of the Institute.

ARTICLE IV – OFFICERS
1. The following Chapter officers comprise the Executive Board of the Chapter and their duties are
   - **President:** presides at meetings, represents chapter in external affairs, and provides direction to the activities of the chapter and its officers.
   - **Past President:** provides continuity of leadership for officers by acting as a guide and historical resource for chapter decisions.
   - **Vice President/President-Elect:** assumes duties of the absent president and administers cultural and social activities. There is no election for President, because this is an automatically promoted position, derived from Vice President/President-Elect.
   - **Secretary:** administers correspondence and amendments to bylaws (Section VIII), announces meetings, and maintains contact with the Institute. Files annual report to the Institute that describes chapter activities.
   - **Treasurer:** is responsible for financial matters, to include receipt of all financial reports from the Institute and conveyance of financial information to the chapter membership. Approves all expenditures and monitors receipts or conveys receipts to the Institute in a fiscally sound manner.

   The elected officers collectively decide appointments to special positions, e.g., Newsletter Editor, Webmaster, Business Outreach Coordinator, and Historian. All elected officers must be members of both the chapter and INFORMS.

2. **Terms of Office.** President, Past President, Vice President/President-Elect serve annual terms. Secretary and Treasurer serve two-year terms.

3. **Nominations and Elections.** Nominations and elections occur during the [month] general meeting. Nominations will be made from the floor, and only members of the Institute in “good standing” can nominate or be nominated. A special election will be held whenever an elected position becomes prematurely vacant. Such elections will be conducted as normal. Only chapter members in “good standing” may vote in officer elections. Annual elections will be for two positions: (1) Vice President/President-Elect and (2) Secretary or Treasurer, only. Secretary and Treasurer shall be elected in alternating years. (There is no election for President, because this is an automatically promoted position, derived from Vice President/President-Elect.)

4. **Voting.** Elections shall be held by secret ballot and are determined by majority vote. Ties shall be resolved by means of a fair random process.
5. **Removal from Office.** An officer may be removed when it is in the Chapter’s “best interest” – a necessarily subjective condition that must first be unanimously recognized by all other elected officers. The affected officer will be allowed a defense free from interference. The other officers will weigh the merits of the case in a way that they find suitable and will render a majority decision.

**ARTICLE V – MEETINGS.**

1. General meetings are meetings where all Chapter members are invited. General meetings shall be held as planned by the Program Committee. Meeting time, place, and agenda shall be set by the officers and are announced at least [time period] in advance.

2. The election meeting shall be a general meeting held in [month] of every year.

3. Executive Board meetings are meetings where only the Executive Board members are invited. Executive Board meetings shall be held as planned by the President, but only upon notice to all members of the Executive Board.

4. A minimum of [number] meetings of the Chapter shall be held in each calendar year, including a general meeting.

5. Robert’s Rules of Order shall govern all meetings, in all cases to which they are applicable and in which they are not inconsistent with the bylaws.

**ARTICLE VI – RESPONSIBILITIES TO INFORMS**

1. The Chapter and its officers, under charter from INFORMS, are accountable to the Institute for all operations and procedures. The INFORMS Board may suspend or revoke the Chapter’s charter for inappropriate operations or procedures. In the event of dissolution, the Institute shall decide how to dispose of the Chapter’s assets.

2. The Chapter shall not maintain any bank account separate from accounts owned by INFORMS.

3. The Chapter shall file an activity report annually with the INFORMS Business Office describing Chapter activities during the past January 1 through December 31. This report is necessary for recertification of the Chapter. It shall be filed no later than January 31.

**ARTICLE VII – DUES.** Chapter dues will be assessed on all members at the time they join or renew. The Chapter officers collectively set the dues schedule.

**ARTICLE VIII – AMENDMENTS AND PROCEDURE**
1. The Secretary in an official Chapter meeting will present amendments to these bylaws. The Secretary, no later than [number] calendar days before the next meeting, shall submit in writing the proposed amendment to all Chapter members. The vote will occur at the next general meeting, and the amendment must be approved by two-thirds of the members present, provided that number constitutes a quorum as defined below. The amendment will then be sent to the INFORMS liaison who will present it to the INFORMS Subdivisions Council. The amendment becomes effective when approved by this Council.

2. A quorum necessary for conducting Chapter business at a general meeting is defined as 5 members or 5% of the Chapter membership, whichever is larger.

3. The President shall make rulings on any point of procedure not included in these bylaws.
APPENDIX C: Chapter Activity Report

http://www.informs.org/Participate-In-a-Community/Regional-Chapters

is the location of the Chapter Activity Report.
APPENDIX D: Public Relations Strategy for Chapters

Chapter Handbook, Public Relations

Public relations, in its classic definition, is “the management function which evaluates public attitudes, identifies the policies and procedures of an individual or an organization with the public interest, and plans and executes a program of action to earn public understanding and acceptance,” (Cutlip, Center, and Broom, “Effective Public Relations,” Prentice Hall).

INFORMS Chapters have three basic goals in their public relations:
- Publicizing chapter events
- Recruiting chapter members
- Branding the profession

You can use a range of communications to achieve these goals, including flyers, direct mail, e-mail, your website, press releases, and paid advertisement. However, you may find that at the local level, the very best means of public relations is plain old conversation, either face-to-face or by phone, with the people you are trying to persuade. INFORMS is always available to help. Contact the INFORMS Public Relations Department through the INFORMS News Room for assistance at any time.

Publicizing Chapter Events

Much of your public relations will be built around your events and persuading people to attend them.

Begin, of course, with a good program and a good speaker. How, you may ask, do you select a good speaker? There are no sure ways – inevitably, some programs will be successes and others will be disappointments.

But you can do a lot to choose a speaker for your chapter:
- Brainstorm with your officers and programming committee to develop a good list of possible speakers.
- Consult the online INFORMS Speakers Program for speakers in your area and national speakers in the specialties that interest your members.
- Solicit feedback from lots of potentially interested people to find out what kind of programs and speakers they want.
- Remember that many people join societies to advance their careers; offer them programs to find jobs, preserve their OR departments, and gain promotions.
- And: plan to serve food, at least light refreshments. It’s amazing how much food enhances the reception of a speaker and program.

In your publicity, design solid messages about the upcoming program that include an engaging program title, an interesting description of the topic with a pithy speaker biography, and the basic information people will need to attend: who will be speaking,
where, when, directions, parking, admission price, as well as contact information by phone, e-mail, and regular mail.

If possible, use a professional designer to create your materials, so you make the very best impression.

Stay within your budget. And remember that you will spend different amounts of money, volunteer time, and resources based on the importance of the individual programs.

Publicity Through Direct Mail
Direct mail – both snail mail and e-mail – is the most basic method of alerting people to chapter programs and events. Begin by compiling lists of potentially interested people, both in the form of mailing labels and e-mail addresses.

These potentially interested people may be found among:
* Current and past members of INFORMS in your area.
* Members of local, related professional organizations who are also potential members of INFORMS (IEEE, SIAM, ACM, IIE, etc.).
* Employees of businesses and governmental agencies engaged in operations research.
* Supervisors of operations researchers, such as Chief Information Officers, who can benefit from learning about the work of their OR employees.
* Faculty and students of engineering schools and business schools that provide courses in operations research, management science, and related disciplines, such as math, statistics, the physical and engineering sciences, economics, and computer science.

As mentioned, you will alert current and past members of your chapter, as well as other members of INFORMS in your area who have not joined your local chapter. As you are updating your list every year, don’t ignore past members who remain in the area but do not rejoin; they may still attend your events and may eventually return to the chapter. The INFORMS office can help you identify all these people.

You will have to do some research to reach other groups. Begin with your Rolodex or Palm Pilot, phoning friends and colleagues to track down contacts at other organizations. Check your yellow pages for the address and phone numbers of sister societies. Look online for their national headquarters and search the sites for information about a local chapter in your area.

When you are seeking mailing lists from other organizations, take a moment to decide if you want to barter lists. Often, you can obtain mailing labels and e-mail addresses from a sister society by offering your own list so that organization can, in turn, market to your members. However, remember the down side: If there is a lot of competition for members among a small local pool and resistance to joining several societies, sharing your names with other organizations could allow them to lure aware your members.

Once you have your snail and electronic mailing lists in place, make sure to tailor the message to the medium. If you are sending an e-mail, keep the message shorter than the
print version so readers don’t have to scroll. If you can provide online registration, make sure to include the link or e-mail address for responses.

More Publicity Methods
Depending on the importance of an individual event and the volunteers at your disposal, you can use additional methods to publicize upcoming events.

Design a flyer on your word processor or, even better, with the help of a designer. Personally hang flyers if you have the time – that way you know the job is getting done. You can also mail copies for posting at university and office bulletin boards. Post flyers on campus near engineering schools, business schools, math departments, and other areas where your target audience may spot them. If you’re mailing copies to a practice member, send extra copies for distribution among colleagues.

For major annual programs, send save-the-date cards in advance and later, if funding is available, well-designed brochures with reply forms.

If your chapter publishes a regular newsletter, make sure to list the next program, as well as whatever upcoming events are scheduled so that your readers can plan ahead and save the date.

When contacting the media to publicize upcoming events, mail, fax, or e-mail press advisories, monitor their effectiveness, and don’t stay committed to media relations if you find that it doesn’t lead to higher attendance. For print media and most broadcast media, follow a format like that in the INFORMS News Room at Terrorism and the Supply Chain.

If a local radio or television station is willing to run a public service announcement (PSA) and wants you to provide it, ask them for their needs. Work with the station and the INFORMS Public Relations Department to prepare the PSA.

Phone trees can be used, but should not be overdone. When advance reservations are lagging and the event is judged sufficiently important, ask the members of your program committee and board to telephone members of your chapter to tell them about the event. Ask them if they are coming and keep a tally.

To ensure the quality of your events, ask those who attend to complete a program evaluation at the conclusion. In the evaluation form you prepare, ask respondents to list the event, the quality of the speaker on a scale of one to five, and the suitability of the topic on a scale of one to five. Ask them to suggest future programs. Provide a space for open-ended comments. And use the form for an additional purpose: Ask the respondents if they want to join a chapter committee – or join the chapter. Leave room at the end of the survey for those who are providing their names and contact information.
Public Relations for Chapter Recruitment
Recruiting new members is key to starting a new chapter and keeping an established chapter vital.

The INFORMS Marketing Department offers numerous materials to help you. Those interested in joining the INFORMS national organization can point their browsers to http://www.informs.org/Membership/Join-INFORMS-and-or-INFORMS-Communities. National membership and local membership work hand-in-hand; those applying for national membership can apply as well for membership in your chapter.

The INFORMS office has printed materials that you can share with prospective members. To obtain materials and touch base with the INFORMS Marketing Department, send an e-mail to informs@informs.org or call the INFORMS office at 1-800-4INFORMS.

As you begin your recruitment campaign, remember that people join organizations for many reasons: to socialize with people in their field, attend presentations, learn new methods, find employment, and advance their careers.

Use informal (conversations with colleagues) and formal (market research, if funding is available) ways of gauging local needs and design your recruitment campaign accordingly.

If you’re contemplating formation of a new chapter, you will want to begin by identifying a core group of volunteers who will commit to regular meetings and committee work. Building a chapter campaign around a strong series of monthly talks is one way of converting lecture attendance into membership. (See the section about publicizing chapter events elsewhere in this appendix).

Amplify your campaign with a direct mail campaign (see the section about direct mail in the publicity section of this appendix). A typical direct mailing includes a brochure, a cover letter, a response card, and a return envelope. The INFORMS Marketing Department at 1-800-4INFORMS or informs@informs.org can help you design direct mail pieces and obtain mailing lists.

Posting flyers on campus and making announcements at welcoming sister societies are other ways of soliciting members in your area. Asking a colleague to spread word about your chapter to other operations researchers is one of the most effective ways of organizing.

Remember: Personal contact or talking directly to another person is still the most powerful persuader, even in our era of high tech.
Branding the Profession

Operations research has contributed billions of dollars to small and large businesses. It has helped win victories in World War II and the Gulf War. It has equitably distributed human organ donations to the desperately ill and helped prevent AIDS.

Then why haven’t our employers – and our family members – ever heard of operations research?

Because we need to communicate our message about the benefits of OR. Communicating that message isn’t just a point of pride in our work; it has important professional implications as well. By explaining our work to our employers, we convince them to consult us before making major decisions, to hire us, to give us raises, and to retain endangered OR departments.

The INFORMS Public Relations Department has an active PR and branding campaign to achieve these purposes. Find out more, and contact the PR Department, by pointing your browser to the INFORMS News Room. Recent issues of ORMS Today have followed the “Marketing the Profession” campaign and will bring you up to date on slogans and ideas. At the local level, you can spread the word about the profession internally through your members’ own companies and externally through the print and broadcast media.

Internally, you and your members can point out best practices to your employers. INFORMS examples are at Edelman Prize and INTERFACES for examples of best projects and INFORMS Prize for examples of companies that have used OR systemwide. Share relevant examples with members and their supervisors when possible. You can also brief colleagues and make sales pitches to executives by using the INFORMS Corporate Outreach Presentation.

When seeking ways to approach the media, keep these thoughts in mind:

- Try to spot stories that would interest a broader public. If OR is part of a new business trend in your area, don’t be afraid to call the business reporter at your newspaper or business paper and tell them about it.
- When your programs feature presentations tied to topics in the news, invite local reporters to attend.
- If your members have “News You Can Use,” share it with the public.
- Alert the press when members of your chapter publish studies in INFORMS journals that have a wider interest.
- When a member of your chapter has used OR to help people in your community, let the world know.
- If you feel passionately about a subject and can bring your OR expertise to bear, submit an editorial to your local newspaper and mention OR in your title and the op/ed piece.
- If you’ve heard a human interest story about a member’s use of OR to triumph over adversity, bring it to the attention of the media.
Remember, the INFORMS Public Relations Department is available to provide assistance. To speak with the INFORMS PR Director, call 1-800-4INFORMS.