

# **GUIDELINES**

## **INTERNATIONAL SYMPOSIUM ON FORECASTING**



**THE INTERNATIONAL INSTITUTE OF FORECASTERS**

*Edited – Sept 2024*

This document includes the principles and guidelines for organizing the International Symposium on Forecasting (ISF). The International Institute of Forecasters (IIF) is a non-profit organization liable to the State of Massachusetts laws and therefore any person or institution organizing any activity on behalf of IIF has to comply with the relevant Massachusetts laws. The principles and guidelines below are formulated according to such legal requirements.

## **PRINCIPLES**

- PRINCIPLE 1:** The ISF is a major activity of the IIF (along with the publication of the *International Journal of Forecasting* and *Foresight*), and only the IIF has the right to organize such symposiums or conferences under the name of ISF.
- PRINCIPLE 2:** The IIF may agree to jointly organize an ISF with another institution or other institutions. A written agreement is to be reached between the IIF and the Organizing Committee of the ISF (OC), whether this represents an institution or has a more independent position. In the agreement, the following issues should be highlighted:
- a. OC of the ISF,
  - b. Preliminary budget for the proposed ISF, which must be approved by the IIF Treasurer,
  - c. Conference facilities to be used by the ISF,
  - d. Risk management of the ISF, including any sharing of financial risk.
  - e. Any surplus realized at the end of the ISF belongs to the IIF and the General Chair of the OC agrees to transfer the surplus to the Treasurer within *three months* of the conclusion of the ISF. Any exception from this rule must be agreed upon in advance and mentioned in the written contract between the OC and IIF. In that contract, any concession by IIF concerning profits must be more than compensated for by a share in potential losses that the OC would have to cover.
- PRINCIPLE 3:** The President and the Treasurer are the official representatives of IIF. They share with the local organizers the role of being hosts of the ISF. The President should be given a short welcome address at the welcome reception on Sunday.
- PRINCIPLE 4:** The General Chair of the OC is the Executive Director of the ISF and has the authority to act on behalf of the ISF within the policies set by the OC. He/she has the authority and responsibility for the expenditure items in the budget and should consult the IIF Treasurer prior to any major financial commitment that is *not included* in the budget. Furthermore, he/she should send revised budgets to the Treasurer, IIF President and Business Manager three months prior to the conference, one month prior to the conference, and two weeks prior to the conference. The General Chair of the OC should forward the IIF Treasurer a copy of all correspondence and contracts related to keynote speakers or other invited individuals whose expenses may be reimbursed by the ISF.
- PRINCIPLE 5:** All payments related to the ISF must be made based on original documents. No payment should be made if the original documents are not attached to the claims. Documents received by electronic mail are acceptable. The General Chair of the OC agrees to fully cooperate with the Treasurer in collecting the Accounts Receivables.
- PRINCIPLE 6:** Contact the IIF director responsible for future symposia for questions and keep him/her continuously informed about how your preparations proceed.

## **GUIDELINES**

- I. **Proposal to the Board of Directors (to be presented at Board of Directors meeting held during the ISF at least 3 years before the event).** In addition, please see Appendix 8 for a list of budget and other deliverables required by the Board of Directors.

A **firm commitment** to organize an ISF must be submitted to the IIF Board of Directors through the director responsible of future symposia at the ISF three years before the event, at the latest. When **proposing** the organization of an ISF, you should consider the following issues:

- A. **Organising Committee, General Chair and Program Chair.** The names of the Organising Committee headed by the General Chair and Programme Chair should be proposed.
- B. **Dates for ISF:** Most ISFs have been held between **June 10 and July 15** starting on a Sunday afternoon (registrations and welcome reception) and with sessions programmed from Monday morning to Wednesday afternoon. The conference closes on Wednesday afternoon with the final keynote followed by the Closing Ceremony (hosted by the IIF President: including presentation of Fellows, Student Awards, IJF awards, Special notices and Tributes, presentation of the next ISF). Consider potential date conflicts as, for example, vacations or weather. It is also important to check other meetings for possible conflicts or cooperative opportunities. For example, the International Association of Applied Econometrics meeting is also held annually in June around the same period.
- C. **Location:** When choosing the location, you should consider both the city and the venue. IIF have tried to rotate among continents in choosing the locations of ISF; see Appendix 1 for a list of past ISF locations. In choosing the **city**, it is important to consider that easy access to an international airport is a great advantage. With respect to the **venue**, you should consider that the number of expected participants is in the range 300-550. Therefore, the venue should have:
- One large room for keynote plenary sessions and practitioner speakers able to accommodate all delegates.
  - A total of 10-14 rooms. Of those:
    - 6-10 rooms able to accommodate around 40-120 people for parallel sessions;
    - An additional 4-6 rooms able to accommodate around 30-50 people for parallel sessions.
  - 1 room (capacity 16-20 round table setting) for IIF Board of Directors (Saturday and Sunday).
  - 1 room (capacity 30-50) for the Summer School (Saturday and Sunday).
  - 6-8 rooms (capacity 30-50) for Workshops (Sunday).
  - Rooms for IJF Associate Editors meeting (Sunday, late afternoon) and IIF members meeting (Monday, later afternoon).
  - Exhibit and registration areas.
  - Facilities for coffee breaks and lunches.

There are three main alternative types of venues:

- **Hotel venue.** Hotel prices are negotiable, so get bids from several hotels. Meeting space is often free if enough rooms are booked. Contracts usually require the ISF to guarantee that a given number of rooms will be purchased. Prices can be very flexible (e.g. reductions of 30% or more) in slack times. Other aspects may be negotiable. Food and beverage are difficult to work into the negotiation.

- University buildings. They are often less expensive, and inexpensive lodging may be available on campus and nearby hotels.
  - Convention centres. Convention centres can be quite costly. Organisers need to be aware of the cost for AV.
- D. **Registration fees and potential sponsors.** The success of an ISF depends to a substantial degree on availability of external funding. Sponsorship has assisted the IIF to lower and hold registration fees at a low level, while increasing the amount and quality of extras offered (such as a heavily discounted price on the Gala event). The IIF's aim is inclusivity and building community and keeping our registration fees consistent. Registration fees are communicated and confirmed with the President of the IIF. Note that sponsoring should not involve side conditions that may jeopardize the status of IIF.

The IIF Business Manager will lead the negotiations with long term established IIF sponsors and support the General Chair in the outreach for new sponsors ([see Sponsorship Brochure](#)).

## II. Information to be presented at the Board of Directors meeting held at the ISF 2 years ahead.

The General Chair of the ISF should present the following information for approval of the Board of Directors at the meeting held two years before the proposed ISF:

### A. Organizing and Program Committee

The General Chair should first establish a Program Chair. Together they should establish an Organizing Committee (OC) with delegated responsibilities, including aspects of the administration, planning and finances, and a Program Committee with responsibilities in organizing the academic program. The Treasurer and the President or nominated director(s) of the IIF are *ex officio* members of the OC of all ISFs. The General Chair of the OC should therefore include them in communications to the OC.

It is preferred, but not required, that some members of the OC are located at, or close to, the site where the ISF is to be held.

After approval from the Board of Directors, a formal contract (MOU) is to be set up and signed by the General Chair and by the President of IIF, or a Director he/she appoints, defining the responsibilities of both parties according to PRINCIPLE 2.

After consulting the IIF Treasurer and the Director responsible for future symposia, the General Chair should sign a contract with the venue. If an advance payment is required, contact the IIF Business manager and Treasurer.

### B. Preliminary budget. In preparing the preliminary budget, the following issues should be considered:

#### 1) **Income.** There are two main sources of income: Registration fees and Sponsorship.

Income from registration depends on the number of attendees and the fees. The number of attendees over the last few years has been between 300 and 450; see Appendix 2 for historical fees and Appendix 3 for information about the number of attendees to past ISFs. One of the keys to a successful ISF is to plan for the budgeted number of participants. The IIF Board of Directors will agree upon the registration fee for ISF.

It is important to note that one of the registration fee types will also include the **fee for annual IIF membership**. In this case, the revenue associated with the membership is credited to the IIF and the 'member registration fee' to the symposium revenue. The aim of IIF is to keep registration fees as low as possible. Please refer to Appendix 4 for guidelines on setting registration fees.

The registration revenue should be estimated according to three scenarios: low attendance, average and high. Break-even should be at "low attendance".

2) **Costs.** The main costs that you should include in the preliminary budget are:

- Space hiring costs (depending on the venue).
- Meals/coffee breaks.
- A/V equipment and possible recording expenses (all keynote talks must be recorded for the IIF YouTube channel).
- Travel and subsistence costs of keynote speakers (usually 6) who should be offered 3-4 nights hotel and economy airfare.
- Travel and subsistence costs of General Chair and Program Chair to previous, as well as current, if needed, symposia.
- Conference Materials - Handouts, badges, brochures, copying, binders, signs, audio taping, correspondence.
- Marketing expenses: Advertising. Note that Elsevier and many society journals will include symposium announcements at no cost.
- Registration costs (commissions for transfer and card payments).

**Very important:** If made in a currency other than \$US, always keep parallel accounts in \$US for all communication with IIF. The **exchange rate** should be fixed at the rate observed when the preliminary budget is presented. However, in preparing the budget, the potential volatility of the exchange rate should be considered. If the exchange rate should be revised, it should always be clear what the budget is both in terms of \$US and the local currency. It is also important to consider the tax system applicable in the local country.

### C. **Keynote speakers**

For the success of an ISF, keynote speakers are crucial. The expectation is for 6 keynote speakers who will talk in plenary sessions. The keynotes are to be selected in communication with the IIF Director responsible for ISFs and/or the IIF President. They should be chosen to cover a variety of topics of general interest to attendees of the ISF. Gender, thematic, geographic as well as other dimensions of diversity and inclusion should be considered and prioritised. A couple of notes:

- i. Keynotes should be centered around forecasting themes.
  - ii. We support and encourage the inclusion of a practitioner as a keynote speaker for a talk of broad and general interest.
- Each year, one keynote speaker should be highlighted as a memorial address. Currently, we alternate between "Arnold Zellner Memorial Address" (ISF2020, ISF2022, ...) and "Clive Granger Memorial Address" (ISF2021, ...).

- Each year, one keynote speaker should be highlighted as the “IJF Editor’s Invited Speaker”. This speaker should be identified together with the IJF Editor in Chief. The respective session should be chaired by the IJF Editor in Chief.

### III. One year ahead: you’re next!

The General Chair and the Program Chair should attend the ISF the year before to:

#### A. Updated detailed budget presented at the Board of Directors

After signing the contract with the conference venue and revising the expected revenues from registration and sponsors, make a detailed budget. This should be much more detailed and should comply with what is required of the final accounts (see examples of [preliminary](#) and [final](#) budgets).

Note that the expenses of the General Chair and Program Chair can be (if required) covered by an advance from the IIF and should be budgeted, so that the advance can be reimbursed next year.

#### B. Promote the next ISF

A booth will be assigned for this purpose in the exhibit area, at no cost to the promoters ([see example poster](#)). The General Chair will be assigned a slot in the closing ceremony to present and promote the next ISF. It is suggested that the presentation involve a small video depicting the host city and country ([see example video](#)) and a slide deck including detailed information such as: location, connections to location, conference venue, speakers (keynotes and practitioner keynotes), social events and Organising Committee ([see example slides](#)).

After the previous ISF, you should prepare the following:

- **Call for papers** – the first call for abstracts is usually distributed in November/December of the year prior to your event. The following are abstract submission categories (suggested only and may be changed):

#### Methodology Areas

Bayesian methods	Neural Networks
Combinations	Nowcasting
Econometrics	Operations Research
Engineering	Risk and uncertainty
Exponential smoothing	State space models
Forecast evaluation	Seasonality
Judgemental	State Space Model
Machine Learning	Statistics
Multivariate times series models	Volatility

#### Application areas

Big data	Intermittent demand
Business cycles	Information and Communications Tech

Climate and environment	Macroeconomics
Crime	Marketing
Data mining	Pharmaceuticals
Demand	Political
Demography	Prediction markets
Education	Sports
Energy	Supply chain
Government	Tourism
Healthcare	Transportation
Inflation	

In the call for papers, it is useful to identify potential *invited session chairs*. IIF directors, IJF editors and associate editors have a particular responsibility to be helpful. The use of invited session chairs is often practical because personal requests (in person or by phone) are very effective in recruiting speakers. Furthermore, *personalised letters (email)* inviting people (such as all previous participants, IIF mailing list, IJF and Foresight authors) is next most important for a useful call for papers. The lists of previous participants and IIF mailing list are available from the IIF Business Manager. The list of IJF and Foresight authors are available from the editors. On top of personal letters/e-mails, the call for papers can be advertised in professional newsletters (see appendix for online resources), relevant journals of the publisher of *International Journal of Forecasting* (currently Elsevier Science), the IIF website, *Foresight*. Note that all marketing material soliciting people to attend should contain a short presentation of *IIF*, making it clear the benefits to becoming a member and receiving our journals. Before using any written material or still or moving images to promote the ISF, ensure that you and the IIF have a legal right to do so. Depending on the license, a written permission from the rights holder to use the material must be provided.

The call for papers should consider the time needed to decide about the papers and announce the decision to the presenters who should be registered before being included in the final program. Note that each attendee can present only one paper. Only in exceptional cases, we may allow more than one presentation.

The final program should be prepared with enough time as to allow attendees to organize their travel arrangements.

- **Accepting abstracts**

In general, abstracts should be accepted as long as they do not represent attempts at commercialism or are papers clearly unrelated to forecasting, or of inferior quality (see Appendix 9 for criteria) Only high-quality presentations will secure future ISFs. Remember only to accept one abstract from each speaker. Notify the participants of acceptance by return email. Call the attention of all speakers to “**Guidelines to Speakers**” posted on the website.

- **Conference program**

The Program Chair is responsible for preparing the Conference Program.

- When preparing the program, you should be careful in not programming parallel sessions with similar topics that can be attractive to the same attendees, although this may be unavoidable with broad themes such as papers that may fall under the Sweet, or MacroFor banners.
- We encourage the PC to require the help of chairs of sections to organize sessions on specific topics such as energy (Sweet), macro (MacroFor), tourism (THE) social good (F4SG).
- Plan for the more popular sessions to be placed in the bigger rooms - depending on availability. Popular sessions may be ones on contemporary topics, e.g., machine learning sessions, or popular speakers, e.g., Rob Hyndman.
- Use the whova app to identify popular sessions from previous years but also by observing likes for the current program and move sessions around if required. Review likes and room sizes throughout the duration of the conference.
- The PC should become familiar with the whova app to be able to introduce last minute changes. To avoid conflicts the process of making changes to the program, from anyone involved with the whova app is to ALWAYS take the following steps:
  1. download the excel file from whova, e.g., "agenda\_export\_isf\_202406.xls";
  2. make edits locally to the excel file;
  3. upload the file making sure no errors are observed.

Confirm in writing the keynote. Ask for the paper (the title, an abstract of less than 300 words and keywords) to be presented. Inform the speaker that this is an address to all delegates and that his/her talk should be comprehensible to the audience, have a firm link to forecasting and be entertaining.

Plan a Practitioner Track, including 5-8 practitioner keynote speakers, that attract people from business. It is recommended but not compulsory that one keynote speaker is included in this track. Practitioner Board Directors are responsible and can assist to build the practitioner track if required. It is highly likely that one session from the parallel sessions will be dedicated to the practitioner track. It is recommended that the same room be allocated for the practitioner track.

The PC should get in touch well in advance with the IIF Director in charge of the FSS in order to minimize invitation costs (FSS instructor should be one of the KS if possible).

Remember that to avoid overcrowding the program and to give all speakers a good chance of having a reasonably sized audience, only one abstract should be allowed to be presented by each speaker. Only presenters who have already paid the registration fee will be included in the program.

The keynote speakers' presentations are programed over 60 minutes. Practitioner keynote talks vary between 30 and 60 minutes. Invited and organized presentations are allocated 20 minutes each. For each organized or invited sessions, the last speaker is automatically the chair of the session. It is recommended that the most experienced delegate be allocated this responsibility (for example avoid allocating this responsibility to PhD students). All session chairs should be notified and made aware of their responsibilities as chairs. For keynote and practitioner keynote talks, you should designate a chair who introduces the speaker and chairs the question time.



Until 2016 there has been a printed Book of Abstracts. However, recently, the program is only available electronically. At the conclusion of the ISF a book of abstracts will be produced. The book is produced by importing into a RMarkdown file the excel file loaded into whova. The Business Manager can assist with this process.

Sessions for the ISF run from Monday to Wednesday. Saturday and Sunday below refer to the days before the ISF. In preparing the Conference Program, you should program the following activities:

1. IIF Board of Directors meeting on Saturday and Sunday. For details, contact the IIF President. Normal refreshments (lunch, coffee/tea) associated with an executive-type meeting should be included. Note that the General Chair is invited to report on the present ISF at the IIF Board meeting on Sunday (usually), the day before the Welcome Reception. The Organizing Committee (in conjunction with the President and the Business Manager) should also arrange for a dinner for the directors on Saturday evening. Any amounts paid for these meetings and the dinner should be recorded separately from other ISF expenses and are a charge directly to the IIF.
2. Forecasting Summer School. The FSS is run by the IIF Director responsible on Saturday and Sunday.
3. Workshops. Pre-conference workshops are held on Sunday. These vary from half day to full day workshops.
4. IJF Associate Editors meeting (1 hour). This is held on Sunday afternoon after the IIF Board meeting and preceding the welcome reception. An associate editors' dinner is organized in conjunction with the IJF Editor-in-Chief on Monday evening. Keynote speakers may be invited at the discretion of the IJF EiC. The Organizing Committee should assist in making reservations, but funding will be provided by the Editor-in-Chief of IJF.
5. Welcome reception for all attendees takes place on Sunday, late afternoon/evening. The Conference Chair, the IIF President and possibly some local authorities can give a short welcome address to attendees.
6. IIF members meeting (1 hour) will take place following the conclusion of parallel sessions on Monday.
7. On Tuesday there is the gala event. The event usually incurs an additional fee, above the registration fee. The aim of the IIF is to provide a heavily discounted price in order to maximise inclusion. Depending on the event organized, this may take place from early afternoon, possibly following a keynote address (2-3). Here are some examples of recent ISF gala events.
  - Cairns, Australia, 2107: visit and dinner at [Rainforestation Nature Park](#) (delegates were transported with buses).
  - Boulder, US, 2018: visit and dinner at the National Center of Atmospheric Research (delegates were transported with buses).
  - Thessaloniki, Greece, 2019: guided tour and drinks at the Archaeological Museum of Thessaloniki followed by dinner at the Polis Convention Center (delegates were transported with buses).
  - Oxford, UK, 2022: welcome reception held at the Ashmolean Museum. Dinner at the Oxford Town Hall.
  - Charlottesville, US, 2023: visit and dinner at the Wool Factory (delegates were transported with

buses).

- Dijon, France, 2024: welcome reception held at the Dijon Exhibition and Convention Centre. Dinner at the Le Domaine Château d'Arcelot. (delegates were transported with buses).

8. Coffee breaks and lunches. Very detailed meal selection (coffee breaks, breakfasts, dinners, etc.). Establish an "international" meal. Make sure that you requested special meals for vegetarians or other special requests. Estimation of number of meals is **financially important**. Registration statistics will provide input to determine quantity of meals to be served, coffee break sizes, etc. Underestimate the number of persons that will attend meals on Monday and Wednesday with peak demand on Tuesday. The IIF business manager and the Director responsible for ISFs can assist here.

In general, contact the IIF Director responsible of future symposia if you need help in organizing these activities.

- **Conference Management system(s)**

We are currently using a system created on the ISF website. This system has been used since 2019. The cost of this system has already been incurred and will only require expenses for updates/edits and bug fixes. It should also be noted that IIF has currently a contract with Whova app (ending after ISF 2026). This service offers online and offline view of the program through a dedicated mobile app. We are committed to using the whova app until a further update. The IIF Director for future symposia and the Business Manager of IIF will guide the use of the conference management system.

In general, the Program Chair, in collaboration with the General Chair and the Business Manager of IIF, is responsible to choose the conference management system that will allow for:

- a. Ability to handle abstract submission (detail specifications are provided in appendix 7).
  - b. Ability to handle registration, including workshops and gala dinner.
  - c. Ability to handle payment (feel free to contact IIF Business Manager).
  - d. Review of abstracts and automatic notification of acceptance/rejection to authors.
  - e. Program creation and scheduling, including setting (parallel or plenary) sessions, allocate talks to sessions, minimize conflicts, etc.
  - f. Converting the current program and abstracts to PDF and/or webpage format.
  - g. Possibility for the program chair to make changes online.
  - h. Possibility for offline access to content.
  - i. Mobile app for displaying final program, delegate communications, conference announcements, etc.
- **Exhibitors.** Companies that want to sell their forecasting-connected merchandise should be charged for participation and for the booth. Make sure you have marketed the symposium to potential exhibitors. The exhibitors' hall should be easy to access and preferably be the place where refreshments or meals are served. For exhibitor's policies of IIF, please contact the IIF Business Manager.
  - **Registration.** The IIF has established its own ISF website <https://isf.forecasters.org/>. This will be used to announce all conference information links to the registration and the abstract submission process.

#### IV. Just before and during the ISF

- A. Appoint staff. If the ISF is using university buildings or is held near a university, students of subjects close to forecasting are natural staff members. They can be offered the right to attend the conference without charge,

they can also be paid, if required, but they are usually volunteers. Staff activities include:

- Conference registration bags are optional. With concern about printing and staying green, we have not offered tote bags since 2019. If your ISF opts to provide bags, they will need to be prepared in advance. Name badges must be printed in advance. If bags are provided, they may contain:
  - Local maps, event brochures, tour brochures, restaurant recommendations, etc.
  - Sponsor swag.
  - Note-taking paper and pen.
  - Gala event tickets should be printed out (and/or online link).
  - Many attendees require certificates of attendance. There is an online form created for this purpose and which will be communicated to all attendees during the symposium.

B. Name badges:

- Design badge (logo, etc.).
- Name and Company should be used.
- The name should be large to be discernible from a distance.
- Your staff members should have a badge, which stands out from others so that attendees know whom to contact for assistance (a large red dot, different colour, ribbon, etc.). IIF directors also need to be identifiable.

C. Information, registration forms, etc., concerning recreation activities.

D. Registration (throughout conference). ISF starts on Sunday with the evening welcome reception. Conference registration should open on Sunday, approximately 1 hour prior to the reception. Staff are required to assist the Business Manager with running the registration desk. Peak demand is on Sunday evening (prior to the welcome reception) and Monday morning. The registration will remain staffed as an information center during the entire Symposium. Ensure you can accept on-site payment, by credit card only. Plan on having extra arrival packets and making some badges for those persons who show up, but did not appear on your roster, substitutions etc.

E. Changing session details on rooms.

F. Checking rooms.

G. Ensure that appropriate A/V staff is available; Locate and check A/V facilities in conference venue.

H. Design and have made Conference posters and Conference direction signs, etc. Signage with the "International Symposium on Forecasting 2XXX" outside the conference building (across the street, or above the conference entrance) helps participants in finding the symposium building(s) and makes a professional impression.

I. Travel Awards. It has been common practice for the IIF to provide awards for students and 'people from disadvantaged areas.' There is a committee of the IIF directors designated to recommend such awards. These are organized and funded directly by the IIF.

## V. After the ISF

The General Chair is to prepare the **Financial Report** of the ISF and submit it to the Treasurer within three months of the ISF and send it to the Treasurer of IIF; see the Appendix with the financial rules. Mail a copy to the President and the Director responsible for future ISFs. The final ISF accounts should list actual receipts and expenses, accounts receivable and payable, if any, (and preferably none), charges to IIF and to IJF, from which the net profit (or loss) for the ISF will be calculated. If the agreement between IIF and OC called for profit or loss sharing, then the agreed-on shares should be allocated to each party, the charges debited will be netted out and transfer of the funds between the

ISF and the IIF made to close out the accounts of the ISF. Retain for at least three years all documentation that would support a possible audit. For every item, also report the budgeted amount. If actual expenses or revenues are substantially different from the figures in the ISF budget, approved by the IIF Board of Directors, an explanation of the reason for the discrepancy and supporting documentation should be included in the report.

Prepare for post conference survey (online). It is important to have a better picture of the delegates, e.g. industry, academia, country, student, sector, gender, etc. to target symposium topics and to assess the academic and practitioner track. It would also be very convenient to obtain a larger response rate of the post conference survey. This is a very interesting source of information for future organizers. In recent years, the survey has been initiated via the app, Whova.

The General Chair is to prepare the **Final Report** and send it to the Director responsible of future ISF. The report should contain:

- A. Detailed information on attendees
- B. Name, title, company, address, phone number, areas of interest, if s/he is an IIF member, etc.
- C. Speakers: name, title, location, company, phone number, subject of speech, etc.
  - 1) Similar information on no-shows for subsequent billing adjustments.
  - 2) Hotel charges to your master account for later audit, including meals.
  - 3) Invoices for audio/visual equipment, photography services, reproduction costs, audio/visual consultants/operators, airfares and fees for guest speakers, etc.
  - 4) If possible, attendance figures for selective sessions and meals.
  - 5) Attendance figures for social program.
  - 6) Devise statistical analysis of critiques.
- D. Check if the presentations contain enough material for a special issue/section of IJF / Foresight. If so, contact Editor in Chief. Recommend good speakers to submit their papers to IJF.

You will want to write 'thank you' letters to all the personnel involved in making your conference a success. These letters should be specialized and not "form letters". Pay particular attention to the persons who should receive copies of this letter, i.e. speakers' managers, etc. Categories are:

- 1. Keynote speakers
- 2. Sponsors
- 3. The hotel conference manager
- 4. Conference staff personnel
- 5. HQ staff that have helped
- 6. Persons who provided special assistance.
- 7. Persons/organizations who controlled equipment, services or funding

E. Follow up items:

- 1. Thank you/proceedings/survey email sent to all attendees
- 2. Summary report/overview for Oracle/blog
- 3. Proceedings (note: proceedings have not been collected since 2019)

## Appendix 1: IIF Symposia, a history

	<b>Year</b>	<b>Place</b>	<b>Organizers</b>
1	1981	Quebec City	Carbone (admin); Oral (admin)
2	1982	Istanbul	Oral (chair)
3	1983	Philadelphia	Armstrong (chair); Lusk (program)
4	1984	London	Fildes (chair)
5	1985	Montreal	Carbone (chair); Dagum (program)
6	1986	Paris	Makridakis (chair)
7	1987	Boston	Armstrong (chair), Winkler (program)
8	1988	Amsterdam	De Gooijer (chair); Merckies (program)
9	1989	Vancouver	Kennedy (chair); Murphy (program)
10	1990	Delphi	Makridakis (chair)
11	1991	New York	Levenbach (chair); Ord (program)
12	1992	New Zealand	Catt (chair); Brodie, Jackson, Ahlburg (program)
13	1993	Pittsburgh	Gorr (chair); Koehler & O'Connell (program)
14	1994	Stockholm	Westlund (chair); Karlsson & Öller (program)
15	1995	Toronto	Rahn (chair); Bretschneider (program)
16	1996	Istanbul	Oral (chair); Aksu (program)
17	1997	Barbados	Worrel (chair); Allen (program)
18	1998	Edinburgh	Raeside (chair); Watson (program)
19	1999	Washington	Young (chair); Hamrick (program)
20	2000	Lisbon	Crato (chair); de Lima (program)
21	2001	Atlanta	Porter (chair); Heikes (program)
22	2002	Dublin	Haslett (chair)
23	2003	Mérida, Mexico	De Alba (chair), Guerrero (program)
24	2004	Sydney	Lawrence (chair), Hyndman (program)
25	2005	San Antonio, Texas	Yokum (chair), Flores (program)
26	2006	Santander, Spain	García-Ferrer (chair), Gallego (program)
27	2007	New York City	Lahiri (chair), Kinal (program)
28	2008	Nice	Hamoudia (chair), Burtschy, Guerard (program)
29	2009	Hong Kong, China	Song (chair), Law (program)
30	2010	San Diego, USA	Allen (chair), Gonzalez-Rivera (program)
31	2011	Prague	Fisher (chair), Dostal (program)
32	2012	Boston, USA	Allen (chair), Hyndman and Tashman (program)
33	2013	Seoul, Korea	Bin Jun (chair), Fildes, Song (program)
34	2014	Rotterdam, Netherlands	Franses (chair), van Dijk (program)
35	2015	Riverside, USA	Gonzalez-Rivera (chair), Ruiz (program)
36	2016	Santander, Spain	Garcia-Ferrer (chair), Poncela (program)
37	2017	Cairns, Australia	Hyndman (chair), Athanasopoulos (program)
38	2018	Boulder, USA	Tashman (chair), Petropoulos (program)
39	2019	Thessaloniki, Greece	Athanasopoulos (chair), Syntetos (program)
40	2020	Virtual	Athanasopoulos (chair), Hong (program)
41	2021	Virtual	Athanasopoulos (chair), Panagiotelis (program)
42	2022	Oxford, UK	Boylan (chair), Svetunkov (program)
43	2023	Charlottesville, USA	Grushka-Cockayne (chair), Schneider (program)
44	2024	Dijon, France	Hamoudia (chair), Ferrara (program)

## Appendix 2: Registration Price History of ISFs

All prices are in US Dollars

<i>Year</i>	<i>Location</i>	<i>Early reg.</i>	<i>Late reg.</i>	<i>Non-IIF</i>	<i>Student</i>	<i>Notes</i>	<i>Hotel*</i>	<i># Deleg.</i>
1981	Quebec	563	784	N.A.	N.A.	N.A.	N.A.	N.A.
1982	Istanbul	183	220	N.A.	N.A.	No meals	N.A.	N.A.
1983	Philadelphia	361	413	N.A.	N.A.	N.A.	N.A.	N.A.
1984	London	301	434	0	N.A.	N.A.	N.A.	N.A.
1985	Montreal	432	544	N.A.	N.A.	N.A.	N.A.	N.A.
1986	Paris	524	601	N.A.	N.A.	N.A.	169	N.A.
1987	Boston	453	634	N.A.	N.A.	N.A.	121	N.A.
1988	Amsterdam	321	419	N.A.	N.A.	Speakers cheap	263	N.A.
1989	Vancouver	420	595	35	N.A.	+35 non-speak.	N.A.	N.A.
1990	Delphi	N.A.	N.A.	N.A.	N.A.	Invited subsid.	N.A.	N.A.
1991	New York	354	411	N.A.	82	N.A.	N.A.	N.A.
1992	Wellington, NZ	331	331	N.A.	66	N.A.	N.A.	N.A.
1993	Pittsburgh	324	384	59	59	N.A.	124	N.A.
1994	Stockholm	253	N.A.	N.A.	N.A.	N.A.	86	N.A.
1995	Toronto	330	386	56	56	Paid bar	112	N.A.
1996	Istanbul	327	409	55	N.A.	N.A.	153	N.A.
1997	Barbados	N.A.	N.A.	N.A.	N.A.	Special arr.	N.A.	N.A.
1998	Edinburgh	400	483	83	200	N.A.	125	255
1999	Washington DC	412	500	87	180	Day rate 125	162 + 14%	330
2000	Lisbon	455	535	80	165	N.A.	95	335
2001	Atlanta	475	635	80	175	Day rate 100	106 + 10%	350
2002	Dublin	456	522	80	119	Day rate	97-254	355
2003	Merida	188	219	10	36		102+17%	219
2004	Sydney	625	740	na	250		180	341
2005	San Antonio	500-575	795	250	250-350		169+16.5%	270
2006	Santander	590	867	na	246-369	Membership included in fee	117	316

2007	New York	590	670	80	390	No breakfast	219 + tax	421
2008	Nice	615	990	85	335	breakfast included	240	402
2009	Hong Kong	650 **	950	720	385		200	217
2010	San Diego	620	920	700	380		265	290
2011	Prague	580	880	660	360		130-320	314
2012	Boston	620	920	720	380		249	425
2013	Seoul	550	850	630	280		175	220
2014	Rotterdam	680	810	950	340		130-150	346
2015	Riverside	595	795	795	295		139	301
2016	Santander	525	725	725	275		140-300	334
2017	Cairns	490	640	650	190		145	232
2018	Boulder	490	640	660	190		235	347
2019	Thessaloniki	490	650	660	190		170	431
2020	Virtual	***						650
2021	Virtual	***						695
2022	Oxford	490	na	660	150			430 (165 remote)
2023	Charlottesville	490	na	660	150 / 290			353
2024	Dijon	490	650 / 820	690	150 / 290			555

\*) If only one hotel price is given, this is the price of a single room in the hotel where the ISF is held. Many ISFs have been held in universities where student lodging has been available.

\*\* Starting in 2009: the early/late registration fee refers to the Member rate; non-IIF refers to non-member, early rates; student rate is member

\*\*\* for virtual attendance, registration fee = cost of 1-year membership

### Appendix 3. Number of Delegates at ISFs

<b>Year</b>	<b>Location</b>	<b>Total</b>	<b>Early/ Regular</b>	<b>Late</b>	<b>Student</b>	<b>Day</b>	<b>Non-pay</b>	<b>Special</b>
2002	Dublin	355	202	28	36	36	46	7
2003	Merida	219	188	31	36	NA	36	10
2004	Sydney	341	188	88	38	8	40	25
2005	San Antonio	270	16	30	44	11	18	20
2006	Santander	316						
2007	New York	421	310	30	81	13	42	
2008	Nice	402	218	31	89	2	62	
2009	Hong Kong	217	164	9	44	0	44	
2010	San Diego	290	177	19	37	0	57	
2011	Prague	314	166	22	66		55	* 5
2012	Boston	425	249	24	76	11	57	* 8

2013	Seoul	220	143	9	27	0	41	
2014	Rotterdam	346	203	42	58	0	43 **	
2015	Riverside	301	205	5	39 (18 travel awards)	2	50	
2016	Santander	334	219	7	50 (15 travel awards)	0	50	8
2017	Cairns	232	130	13	41	0	48 **	0
2018	Boulder	347	185	35	60	4	63	0
2019	Thessaloniki	431	250	36	89 (15 travel awards)	0	56	
2020	Virtual	650	426	na	185	na	39	
2021	Virtual	695	526	na	137	na	32	
2022	Oxford	430	266	na	106 (8 travel awards)	0	58	172 remote attendees (148 regular; 24 students)
2023	Charlottesville	353	237	na	68 (11 travel awards)	0	48	
2024	Dijon	555	504	51	134 (10 travel awards)		57	

\* Paid attendees, but did not show

\*\* Includes travel awards

#### Appendix 4. Guidelines for setting registration fees

- Academic attendees, who are price sensitive, make their decisions much earlier than practitioners. The early price can be much lower encouraging early sign-up. We suggest that it be about 2/3 of the regular price.
- Students (incl. PhD students) must be offered a lower price. Students are very sensitive to their overall costs for participating, but form an important group, considering the future of IIF.
- Emeritus professors and retired professionals are offered the student fee.
- IIF Fellows: Normally, Fellows are offered the member rate. If they are retired, they receive the student rate, as referenced above. If the Fellow is on the OC or PC or organizes a session for the current ISF, the student registration rate may also be offered.
- One-day participation fees are allowed.
- The following are exempt from registration fees: Directors of IIF, IJF and Foresight Editors, Keynote and Practitioner Keynote speakers, and workshop instructors.
- Members of the organizing and program committees should pay full registration. However, they can be contingent on the amount of participation in conference planning. Final determination is by the General Chair. For example, an active committee member may be offered the "student" rate.
- Workshops. Workshop instructors do not receive a stipend. If the instructor will be attending the symposium, the ISF organizing committee may offer, 100% registration discount (one free registration pass). These are



general guidelines, and the final decision will remain with the organizing chair. See the workshop guidelines for more detail.

- Cancellation policy. Set date, 2-3 weeks before the start of the symposium for full refund of registration fees. After that date, a certain amount (e.g. 50%) is kept covering expenses.

## Appendix 5. Financial Rules

- 7) You should check each invoice in detail. This area of fiduciary responsibility is extremely important!!
  - Resolve any problems in writing.
  - Arrange for payment.
  - Retain copies for possible audit purposes and to help future organizers.
- B. Remember, the more precise you are in identifying expenses, which will be paid and will not be paid by ISF in your individual confirmation letter to keynote and practitioner keynote speakers, the fewer problems you will encounter. A keynote speaker is entitled to free registration, free travel in Economy Class and free hotel accommodation. Practitioner keynote speakers are entitled to free registration. These are ISF expenses.

### **Reimburse keynote speakers as soon as possible!**

- C. Board of Directors' and associate editors' dinners may (for convenience) have been billed on ISF but should be charged to the IIF.

The next year's Chairperson and Program Chair should charge their expenses on their own ISF. IIF can pay an advance. Directors get free registration.

Traditionally, ISF organizers (general chair, program chair, local arrangement officer) receive complimentary registration. The OC may grant reduced or free registration to volunteer and paid staff, and to local students. These participants should not be identified on the participant list and will not become members of IIF. If an OC member or an employer of the organizers is a financial sponsor of the ISF, then it is entitled to register a number of employees as regular ISF participants who will become members of IIF. The IIF board and the sponsor must reach prior agreement on the conditions and the number of such employees.

- D. The ISFs should preferably generate a profit or at least break-even. If a profit occurs, this should be transferred to IIF. But it should be emphasised that we do not run the ISFs to generate a profit.

## Appendix 6. Abstract Submission Requirements

The following constitutes a list of fields and features that are recommended for the abstract submission system:

- Title of talk
- Authors' information: Title, Name, Surname, Institution, Country, email,
- Multiple co-authors (3 as a default view, with the option to add more if the needed).
- Presenting author (by default the first author).
- Contact author.
- Abstract (including a word-limit to, usually, 300)
- Keywords, either as one textbox where key-words are separated by a pre-defined symbol, or separate text-boxes, one for each key-word.
- Forecasting Topic Area - as drop-down menu.
- Invited session, if the submitted paper is to be included in an invited session
- Ability to edit abstract, after submission, along with ability to specify cut-off date.
- Email acknowledgement after submission/change is made.

- Ability to make accept/reject decisions and notify submissions, via email, of decision.
- A useful feature would be author look-up (rather than each author re-inserting the info of all co-authors). If a co-author is already registered, then addition of co-author information should be automatic.

## Appendix 7. Budget and Administrative Requirements

1. Preliminary Logistics	2-3 years ahead
2. Prepare Preliminary Budget	2 years ahead
3. Pricing	18 months ahead
4. Obtain Budget Approval from IIF Board	15 months ahead
5. Conference Program	15 months ahead
6. Keynote Speakers	15 months ahead
7. Practitioner Keynote Speakers	15 months ahead
8. Workshops, Exhibitors and Social Program	9 months ahead
9. Begin promotions to Participants	9 months ahead
10. Revisit Hotel, Conference Center, University	4 months ahead
<b>11. Revised Budget to IIF Board</b>	<b>3 months ahead</b>
<b>12. Revised Budget to IIF Board</b>	<b>1 month ahead</b>
<b>13. Revised Budget to IIF Board</b>	<b>2 weeks ahead</b>

## Appendix 9. Abstract review criteria / recommendations

1. accept all abstracts from invited sessions
2. accept all abstracts from well-known / past participant's names  
[for above two, only a quick perusal of abstract is necessary]
3. read through and identify if the abstract is related to forecasting - then accept
4. make sure that ones that are completely irrelevant or completely substandard get rejected

### Useful contacts:

IIF Past President and future symposia  
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