



## IIF SPONSORED WORKSHOP/WEBINAR GUIDELINES

In this document, we provide the rules regarding the organization and oversight of IIF sponsored workshops and webinars. The success of this IIF initiative depends on the willingness, entrepreneurship, and volunteering work of the agents promoting these events.

Recognizing the effort of organizing and producing workshops, the IIF will support the budget of the organizers in charge. Webinars, however, require less effort, and the IIF typically does not provide financial support.

The IIF is not involved in the organization, promotion, or production of workshops/webinars -- all logistical matters are handled by the organizer. The IIF will promote the event through our website, blog, social media, and inclusion of relevant information in our bi-monthly newsletter: *The Oracle*.

### 1. Objective

**Workshops:** The workshop should focus on very specific and timely forecasting topics and be “educational” in nature. It should have a well-defined theme that links the prospective papers. It normally runs over 1.5 days with about 8-10 presenters and their corresponding discussants. This small setting allows for informal discussions and productive exchanges. However, the exact format of the workshop can be subject to some variation, depending on the number of participants and the overall theme addressed. For example, round-table discussions or breakout sessions may be appropriate.

Workshop proposals must be reviewed and approved by a committee of IIF directors.

**Webinars:** The webinar should focus on a specific and timely forecasting topic. It normally runs for 60-minutes, which includes a brief introductory statement from the webinar host, roughly 30-40 minutes of educational content, and time for Q&A with the presenters.

Webinars are meant to be “educational” in nature, providing information of value to attendees. Webinars are not to be used as sales/marketing pitches for the organizer’s commercial offerings. Marketing-related material should be limited to one slide, which can include organizer’s website and contact information. The IIF will also provide one slide of marketing content – to be delivered during the introduction by the webinar host.

Webinar proposals must be reviewed and approved by an IIF director.



## 2. Sponsorship

Interested workshop organizers should contact the IIF director in charge and provide a theme and a preliminary budget, along with the rationale for introducing such workshop and a justification of its timeliness. There is no specific format to be followed, rather, we are looking for concise information about the workshop topic, why is it important and timely, when (more or less) it will take place, where it will be organized, who will be organizing the workshop and/or has expressed an interest in presenting, and how much money it will cost (breaking down the budget to some key categories and identifying what the support requested from IIF is).

The workshop organizers must have a sponsor in place that provides the majority of the funds to guarantee the success of the workshop. IIF will not be the sole sponsor – organizers must have additional support. The workshop is open to the public at large and the organizers may choose to set a small registration fee to defray the costs of the organization. However, such fees should be only nominal, to reflect the non-profit nature of the IIF. That is, workshops cannot be treated as for-profit endeavors and the organizers should strive to introduce the lowest fees possible to participants – if such fees need to be introduced in the first place.

The workshop organization resides with the local organizers, and the IIF will offer advice and suggestions and limited financial assistance when needed. The organizers may extend invitations to speakers and discussants and/or may write a call for papers from which they will select the workshop presentations. The organizers should keep the IIF director informed about the progress of the workshop. Travel expenses of speakers and discussants will be covered as much as possible by the sponsor funds and within the rules established by the sponsor. If some travel expenses were to be covered by IIF funds, the Institute would only reimburse economy air fare. IIF will not provide funds upfront to the organizers. However, IIF will pay specific expenses (e.g., refreshments etc.) directly against invoices and/or reimburse speakers for their travel directly. The format and the program of the workshop will be designed by the organizers within the general setting established above.

Webinars have minimal costs and do not require a sponsor other than the organization proposing and producing the webinar. IIF typically provides no funding for webinars.

## 3. IIF budget

The IIF allocation for workshops will be discussed every year at the annual meeting of the Board of Directors. We aim to sponsor two workshops per year. However, if we receive more than two competitive requests, the IIF director may request an increase in the allocation for that year. If the Treasurer considers that the financial status of the IIF is sound and the requested increase does not jeopardize the accounts, the President will bring the requested allocation to the Board for a vote.



#### **4. Approval**

At the annual meeting of the Board of Directors, the director in charge of workshops should present a summary of the workshop activities of the current and future years. The Board will discuss and approve whatever workshops are proposed at the time of the meeting. However, requests will be coming during the year, and in this case the primary IIF director in consultation with the assigned secondary IIF directors will approve or disapprove the request.

#### **5. Advertising**

The local organizers will advertise the workshop as widely as possible. Similarly, the webinar organizer will advertise and promote the event as widely as possible (such as to their customer base, mailing lists, blogs, or online and print advertising). The IIF will announce the workshop/webinar and will establish the necessary links to the organizers in the Institute's website and newsletters.

In all advertising elements, fliers, web page, mailings, etc., as well as documents used for the course and distributed to participants, reference to IIF sponsorship and the IIF logo should be included.

#### **6. International Journal of Forecasting (IJF) special issue on workshop theme**

The *International Journal of Forecasting* may choose to run a special issue on the theme of the workshop, primarily drawing upon selected papers from the workshop. The workshop organizers should seek approval of the Editor-in-Chief of IJF, who in consultation with the IIF director in charge of workshops will appoint guest editors and an IJF editor (and/or possibly an associate editor) responsible for maintaining the quality standards of the journal.

#### **7. Summary of activities**

**Workshops:** The local organizers will provide a summary of the workshop within two months after the workshop has taken place. They should also provide some detailed documentation on how the IIF sponsorship funds were spent. These documents should be sent to the IIF director, with the first one being posted in the IIF website and other venues like *The Oracle* newsletter.

**Webinars:** Organizer will provide a summary of the webinar within two weeks after the webinar has taken place. This will include registration and attendee counts, and other available details on webinar performance (such as average view time, poll responses, and submitted questions). Organizer will also provide the full registration list (including contact information).