

GUIDELINES

INTERNATIONAL SYMPOSIUM ON FORECASTING



THE INTERNATIONAL INSTITUTE OF FORECASTERS

Edited – May 2018

This document includes the principles and guidelines for organizing the International Symposium on Forecasting (ISF). The International Institute of Forecasters (IIF) is a non-profitable 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 on the basis of 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 has to 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. **Dates for ISF:** Most ISFs have been held between **June 10 and July 15** usually starting on a Sunday (welcome reception) and with sessions programmed from Monday morning to Wednesday lunchtime (however the latter years this has been extended to Wednesday late afternoon). 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 Applied Econometrics meeting is also held annually in June around the same period of time.
- B. **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 take into account 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 200-400. Therefore, the venue should have:
- One large room for keynote plenary sessions and featured speakers able to accommodate all delegates.
 - 8-10 rooms able to accommodate around 30-50 people for parallel sessions.
 - Rooms for IIF Board of Directors, IJF Associate Editors and IIF members meetings.
 - Rooms for workshops and Summer School
 - Coffee break, exhibit and registration areas.
 - Facilities for lunch.

There are three main alternative types of venues:

- **Hotels.** At least in the US, hotel prices are negotiable, so get bids from several hotels. Meeting space is free if enough rooms are booked. Contracts usually require the ISF to guarantee that a given number of rooms will be purchased. However, our experience has been that hotels have been willing to drop this. Prices can be very flexible (e.g. reductions of 30% or more) in slack times. Other aspects may be negotiable. Luncheon and coffee breaks are difficult to work into the negotiation.
 - **Convention centers.**
 - **University buildings.** Often, they are much cheaper. Cheap lodging may be available on campus and hotels in downtown.
- C. **Potential sponsors.** The success of an ISF depends to a substantial degree on availability of external funding, holding down registration fees and increasing the amount and quality of extras offered. Note that sponsoring should not involve side conditions that may jeopardize the status of IIF.
- D. **General Chair and Programme Chair.** The names of the General Chair and Programme Chair persons should be proposed.

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. **Preliminary budget.** In preparing the preliminary budget, the following issues should be taken into account:
- 1) **Income.** There are two main sources of income: Registration and sponsorship.

Registration depends on the number of attendees and the fees. The number of attendees has been between 200 and 400; 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 should agree upon the registration fee for ISF. It is important to note that the registration fee may 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. The ISF uses the following system based on time and personal characteristics:

- 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 students 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 Featured speakers.
- 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 will receive no fee. If the instructor will be attending the symposium, the ISF organizing committee may offer, 100% registration discount (one free registration pass) for the leading instructor of a full-day workshop; 50% registration discount for the lead instructor of a half-day workshop. These are general guidelines and the final decision will remain with the organizing chair. See the workshop guidelines for more detail.
- Cancellation costs for no shows (these should be managed so that they are close to zero). Set date, 2-3 weeks before the start of the symposium for full refunding of registration fees. After that date, a certain amount (e.g. \$US100) is kept to cover expenses.

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:
 - Travel and subsistence costs of Keynote and Featured speakers who should be offered 3 nights hotel and economy airfare.
 - Travel and subsistence costs of General Chair and Program Chair to previous, as well as current, if needed, symposia.
 - Meals/coffee breaks.

- Conference Materials - Handouts, badges, brochures, copying, binders, signs, audio taping, correspondence.
- A/V equipment.
- 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 at the moment 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 take into account the tax system applicable in the local country.

B. Keynote/Featured speakers

For the success of an ISF, Keynote and Featured speakers are crucial. They should be chosen to cover a variety of topics of general interest to attendees of ISF. Usually, there are 2/3 keynote speakers who will talk in plenary sessions and 2/3 Featured Speakers who will talk in parallel to other organized sessions.

Each year, one Keynote speaker should be highlighted as a memorial address. Currently, we alternate between “Arnold Zellner Memorial Address” (ISF2016, ISF2018, ...) and “Clive Granger Memorial Address” (ISF2017, ...).

Each year, one Keynote/Featured 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.

C. Theme (optional)

In some instances, ISFs with associated with a particular theme. If the General Chair and Program Chair decide towards this, then it is advisable that there is a number of invited sessions around that theme.

D. Organizing and Program Committee

The General Chair 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 is to be set up and signed by the chair of the OC 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, you should sign a contract with the venue. If an advance payment is required, contact the IIF treasurer.

III. One year ahead: you're next!

The General Chair and the Program Chair should attend the ISF the year before so as 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.

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

Take note of the update exchange rates.

B. Promote the next ISF

A booth must be assigned for this purpose in the exhibit area, at no cost to the promoters. The General Chair will be assigned a slot of time just before or after a plenary session in order to present the ISF.

After the previous ISF, you should prepare the following:

- **Call for papers** with topics as, for example, (not exhaustive)
 1. Econometrics
 2. Economic Forecasting
 3. Business Forecasting
 4. Time Series Analysis
 5. Judgement
 6. Application areas:
 - a. Weather
 - b. Finance
 - c. Operations / Supply Chains
 - d. Government
 - e. Physical / Natural Resources
 - f. Socio-Technical
 - g. Marketing
 - h. Demographics
 - i. Earthquakes
 - j. Criminality
 - k. Sports
 - l. Tourism
 - m. Information Technology/Social Media
 - n. Conflict

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 take into account 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. 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 of 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. Furthermore, be careful in programming Featured Speakers. Their talks will coincide with other sessions and may reduce attendance at these.

Confirm in writing the Keynote and Featured speakers. 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 Practitioners Track, including 5-8 speakers, that attracts people from business. It is recommended but not compulsory that one Keynote speaker is included in this track. You can contact the Director responsible for practitioners’ programs.

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 pay the registration fee will be included in the program.

The Keynote and Featured speakers’ presentations are programed over 60 minutes while invited and organized presentations typically are 20 minutes each. For each organized session, the last speaker is automatically the chair of a session. Notify the person concerned. For Keynote and Featured speakers, you should designate a chair who presents the speaker.

Allow for time to communicate future ISFs, Fellow awards and other IIF news. This usually occurs before or after Keynote addresses; allocate 5-10mins per announcement.

Until 2016 there has been a printed Book of Abstracts. However, recently, the program is only available electronically. The Book of Abstracts should contain all essential information on the symposium. Use books from former meetings as templates. The main principle is a simple, practical and professional layout, easy planning schedules and information that cover all aspects of the symposium. Pictures of keynote speakers and organizers should be included. As soon as the program is final, put the entire Program Book on the website, so that participants can plan their session attendance in advance. Include a list of attendees (of those presenting abstracts) in the Program Book. The Business Manager will help you in preparing the Book of Abstracts.

In preparing the Conference Program, you should program the following activities:

1. IIF Board of Directors meeting on Saturday and Sunday just before ISF. Reserve two days before the ISF starts, normally 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 of the Organizing Committee is invited to report on the present ISF at the IIF Board meeting on Saturday, the day before the Welcome Reception. The Organizing Committee should also arrange for a dinner for the directors the evening before the welcome party (normally Saturday night). Any amounts paid by the ISF for these meetings should be recorded separately from other ISF expenses and are a charge to the IIF.
2. IJF Associate Editors meeting (1 hour). Usually held in Sunday afternoon after the IIF Board meeting and preceding the welcome party. Bottled water should be provided. An associate editors' dinner usually occurs on Monday night. To this dinner keynote speakers may be invited. The Organizing Committee should make reservations, but funding will be provided by the Editor-in-Chief of IJF and by IIF.
3. IIF members meeting (1 hour).
4. Summer School. The Summer School is run by the IIF just before/after the ISF.
5. Workshops. Pre-conference workshops are usually held the day before sessions start.
6. Welcome reception for all attendees. Usually takes place on Sunday. The IIF President and some local authorities can give a short welcome address to attendees.
7. On Tuesday, there is the gala dinner. Assistance to the gala Dinner could be optional with an additional cost beyond the registration fee.
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, using a falling scale for days two and three. When programming the last day (Wednesday) lunch, remember that it has been a great loss item because many fewer people have turned up than expected; however, this may not be the case if Wednesday ends in late afternoon.

You can contact the Director responsible of future symposia if you need any help in organizing these activities. In case she/he feels that planning would profit from having the Business Manager inspecting the site(s) and discussing the plans on the spot, the IIF will pay her/his expenses involved.

- **Conference Management system(s)**

The Program Chair, in collaboration with the General Chair and the Business Director 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.

The expenses/fees associated with such a platform is an ISF expense. The IIF Director for future symposia and the Business Director of IIF can provide suggestions. For ISF2018 the conference management system Exordo.com will be in place; this system offers features for abstract submission, registration, payment, review of papers, creation of the program/scheduling and export to Excel format. It should also be noted that IIF has currently a four-year contract with Whova app (ending after ISF 2021). This service offers online and offline view of the program through a dedicated mobile app, allows for conference announcements and delegates communications and supports import of the full program (sessions, timings, titles of talks, presenters, abstracts, etc) from a pre-formatted Excel file.

- **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 www.forecasters.org/ISF. 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 parts of the conference without charge, and hence can be paid a little, if at all. Staff activities include:

- Packing conference registration bags (if applicable), which should be prepared in advance. Plan disbursement of arrival packets, name badges, etc. Name badges should be in alphabetical order, by category if necessary. If bags are applicable, these may contain:
 - Local maps, event brochures, tour brochures, restaurant recommendations, etc.
 - Welcome letter from an appropriate city executive.
 - Gifts from supporting companies
 - Note-taking paper and pen.
 - Overall conference literature, special brochures, etc.
 - Evidence of attendance (a receipt and/or a certificate) for each delegate.
 - Clear instructions should be given for signing up to the optional social program. Packs should have included registration cards for those who have pre-registered.
- B. Name badges:
- Design badge (logo, etc.).
 - Name is not enough, add at least one: Company or University, City or Country.
 - The name should be large so as to be discernible from a distance.
 - You will probably want clip-on plastic badge holders, or ones that are hung around the neck (lanyards).
 - 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 usually starts on Sunday with the evening welcome reception (18.00h). Conference registration should open on Sunday at 14.00h or 15.00h. Do not forget late arrivals. Even if your confirmation letter should have given arrival instructions including a period of time for conference registration, some attendees will still be late. Reopen your registration facilities early the next morning before the symposium begins. Keep the desk staffed as an information center during the entire Symposium. Ensure you can accept on-site payment, by credit card only. Plan on having some extra arrival packets and making some badges for those persons who show up, but did not appear on your roster, substitutions etc. Someone in the registration team should be in charge to deal with problems.
- 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. Notice board should be available at registration table.
- I. Travel Awards. It has been common practice for the IIF to make a number of awards for students and 'people from disadvantaged areas.' There is a committee of the IIF designated to recommend such awards. Monies for this will come from the Treasurer of the IIF.

- J. Where the ISF has taken responsibility for hotel bookings, registration records should be reconciled with the hotel's room registration log.
 - 1) You may have responsibility for Guaranteed Late Arrival charges if the guest does not arrive, so you want to minimize this exposure.
 - 2) The list should be reconciled each day of the conference to cover early departures, late arrivals, etc. Minimize your work and exposure to risk in this section.

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 unsettled accounts are to be shown as *Accounts Receivable* and *Accounts Payables* in the Financial Report. All accounts receivables and payables are to be given in full detail so that later collections and payments can be made promptly. Moreover, all the supporting original documents are to be attached to the ISF Financial Report. Any losses in exchange rates are at the risk of the Organizing Committee after this period of time. 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. in order 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.

Arrange for payment of bills at a later date.

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 of 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. Email to all ISF attendees, non-members, to encourage them to join the IIF
3. Summary report/overview for Oracle/blog
4. Proceedings

Appendix 1: IIF Symposia, a history

The IIF has organized the following symposia:

	Year	Place	Organizers
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); Merkies (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'Connel (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)

Appendix 6. 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 featured speakers, the fewer problems you will encounter. A keynote/featured speaker is entitled to free registration, free travel in Economy Class and free hotel accommodation. 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 7. 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 text-box 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 8. 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. Featured 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 |
| 11. Revised Budget to IIF Board | 3 months ahead |
| 12. Revised Budget to IIF Board | 1 month ahead |
| 13. Revised Budget to IIF Board | 2 weeks ahead |

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