

MAA RMS SECTION MEETING ORGANIZATION HANDBOOK¹

Unless otherwise noted, the following details are the responsibility of the **Program Chair** at the host institution. Delegation of responsibilities and consultation with section officers and past Program Chairs is highly advised!

VERY ADVANCE PLANNING (at least 2 years prior to the meeting)

VA-1. The **Section Program Committee**² (per the 2018 Section By-Laws, Article VI, Item 2b(i)) shall:

Recommend the time and place of future Annual Meetings, preferably two years in advance, subject to the approval of the Executive Committee. At the request of the host institution, the Program Committee, in coordination with the Executive Committee is empowered to change the time or place of a scheduled meeting.

A long-standing (albeit unwritten) agreement within the section has been to alternate between a meeting sites on the Front Range in one year, and off the Front Range in the following year. Straying from the formula by having two consecutive meetings off the Front Range can be detrimental to meeting attendance. It is less detrimental to have two consecutive meeting on the Front Range, followed by one meeting off the Front Range. Although meetings off the Front Range tend to have lower attendance, it is essential to the health of the section to include these institutions in the meeting rotation. Here, the term "Front Range" is use in a broad sense of where the section population is found, extending essentially from Pueblo in the south, along the I-25 corridor to Fort Collins in the north.

VA-2. As soon as an institution agrees to hosts,

a. **Appoint a Program Chair**; per the 2018 Section By-Laws, Article VI, Item 1,

*At the time that a host institution accepts an invitation to host an Annual Meeting, a **Program Chairperson** for that meeting will be appointed by the host institution per a procedure to be determined by that host institution. This appointment shall be determined as far in advance as possible, but no less than one year in advance of the date of the meeting, to allow for planning of the Annual Meeting and coordination between the **Program Chairperson** and the other members of the Executive Committee. It is allowable for the host institution to designate two people as **co-Program Chairperson(s)**. In the event that an appointed **Program Chairperson** is unable to fulfill the responsibilities associated with meeting planning, the host institution will appoint a replacement.*

b. **Book space on campus** for the event and confirm what, if any, fees will be charged for use of the space. In the case of a joint meeting (e.g., Intermountain Section for meetings held in Grand Junction), contact should also be made with the co-sponsor organization(s) to ensure that there is still interest in proceeding with a joint meeting.

¹ This list was originally compiled from a number of sources, including similar lists compiled by Don Teets (SDSMT) and Bill Briggs (UCD), annotations to Don's list by subsequent organizers, the duties list of the Rocky Mountain Section Handbook maintained by Bill Ramaley, (Fort Lewis) and "Suggestions for Organizing a Good Section Meeting" from national.

² From the 2018 Section By-Laws, Article VI, Item 1:

The Program Committee will consist of the Program Chairperson and section officers ex-officio.

ADVANCE PLANNING: Summer / Early Fall prior to the Meeting Date

- A-1. Arrange for a **small Meeting Committee** (1-3 individuals in addition to the **Program Chair**) at the host institution to assist with organization details. Such assistance is increasingly necessary as the meeting date approaches.
- A-2. **Keynote Speaker(s)** arrangements through the **Section Visitors Program and other national lecturer programs** should be finalized as far in advance as possible, **and no later than the end of August**, to ensure availability on the appropriate dates, and best promote the meeting in the Fall newsletter.
- (a) Either the **Program Chair** or the **Section Chair** can issue the actual invitations (via email) to these individuals. While it is more efficient for this to be done by the **Program Chair** (since that individual will handle all other communication with the speaker once someone accepts the invite), an invitation from the **Section Chair** may be viewed as more formal. The essential point is to make sure this is done early by one of these two individuals, following their consultation with each other (to avoid confusion).
- (b) National covers all travel expenses for one **Section Visitors Program Keynote Speaker** each year; the Section's only financial obligation is to cover registration fees and cost of any social events.
- See <http://www.maa.org/community/maa-sections/section-visitors-program> for a list of currently available visitors.
 - It is customary for the **Program Chair** to consult with the concerning speaker selection.
 - It was long a tradition for the Section Visitors Program Keynote Speaker to deliver both the Banquet Talk (on Friday) and a Keynote Talk (on Saturday morning), even when there is a second Keynote speakers. However, the Banquet Talk can (and often is) instead be given by another invited speaker.
 - The Section Visitors Program Keynote Speaker should also be invited to the Executive Committee Meeting, and to share an update about national programs at the Section Business meeting.
- (c) **Every five years** (those **ending in 00 / 05**), the section is eligible for a **Polya lecturer**, in addition to a Section Visitors Program speaker.
- Travel expenses for a Polya lecturer are also paid by National.
 - A list of Polya lecturers can be found at <http://www.maa.org/community/maa-sections/programs-and-services/polya-lectureship> .
 - Consultation with the Executive Committee is again recommended.
 - The Polya Lecturer has often been asked to deliver a special talk at the close of Friday's scientific program (before the banquet).
- (d) As of this update, national was also committed to continuing its **Editors Lecture Program** at least through 2023.
- A section is eligible for an Editor Lecture (in addition to Section Visitors Program speaker) in the second year after it's eligible for a Polya Lecturer; for RMS, this means **years ending in 02 / 07**.
 - Check <http://www.maa.org/community/maa-sections/programs-and-services/editor-lectures-program> for more information.

- A-3. Notification of the previous year's **Burton W. Jones Distinguished Teaching Award (DTA)** recipient with an official invitation to deliver the **opening talk** of the meeting should also be emailed in late summer / early fall. (Waiving registration and banquet fees for this individual has become standard practice; this additional expense should be kept in mind when setting registration\banquet fees.)
- **NOTE:** In Summer 2017, there was considerable Executive Committee discussion concerning how the previous year's recipient of the **Early Career Teaching Award (ECTA)** would be honored at the meeting. At that time, it was generally agreed that the ECTA recipient would NOT deliver an invited talk. However, at the 2017 and 2018 meetings, different approaches were used to honor the ECTA recipient. Please consult the Section Executive Committee concerning a possible permanent decision in this regard.
- A-4. Some meetings have also included special invited speakers in addition to the invited Keynote Speakers from national and the **Burton W. Jones Distinguished Teaching Award** recipient – and dynamic speakers always make the meeting just that much better.
- Waiving the registration and banquet fees for such speakers has become standard practice; this additional expense should be kept in mind when setting registration\banquet fees.
 - Unless the speaker is paying their own travel expenses, these costs must also be paid through meeting registration revenue, or some other revenue source (e.g., the host institution).
 - It has been rare to provide honoraria to special invited speakers, but this is not prohibited; again, an honorarium expense must be paid through meeting registration revenue, or some other revenue source (e.g., the host institution, NSF-funded programs).
- A-5. Preliminary arrangements for workshops (if any) or panel discussions on a “meeting theme” (if one exists) should also be made during summer / fall. In particular, if a fee will be required for a Friday morning workshop (see Program Scheduling, Item P.2), this should be determined no later than the Spring Newsletter Announcement Deadline (*see Intermediate Planning, Item I.1*). Individuals offering a workshop at the Section Spring Meeting at the invitation of the **Section Program Committee** will receive a travel stipend limited to one night's lodging that is occasioned by a need to arrive a day or more early for the meeting. Funds to cover such travel stipends will be considered as workshop expenses to be covered by workshop registration fees, provided such funding to not available from other external sources (e.g., NSF-funded programs, host institution contribution, workshop presenter's home institution).
- A-6. A **preliminary announcement** including meeting dates, location and any available program details, as well as a Call for Special Session / Panel proposals (*see Program Planning Section, Item 4*), should be prepared for the fall newsletter (deadline is typically mid-September). A call for workshop proposals can also be included if this has not yet been finalized. The meeting announcement should also be distributed as broadly as possible to other regional mathematics/mathematics education professional organizations.
- A COLOMATYC membership email list can be obtained from their current president; the section Vice-Chair should be able to assist with making this contact).
 - CCTM has often published our meeting date/information in their newsletters; the section's **CCTM Higher Education Representative** should be able to assist with making this contact)
 - Other organizations to consider include: Wyoming Affiliate of the NCTM, local SIAM Chapters

- A-7. **Investigate best financial arrangement** on host campus for processing revenue and expenditures associated with meeting. (Many institutions will set up a special account number for this purpose.) Also contact the **Section Webmaster** to inquire about online registration and payment procedures that may already be in place, or to seek assistance from that individual to set up such procedures. (See Advance Planning Item A-11 below for more details on this.)
- A-8. Make **preliminary campus logistical arrangements** for rooms, food, technical needs, parking, etc.
- a. Depending on your campus, some of these arrangements could wait until the spring ... **but ROOM ARRANGEMENTS must be a priority!** Be sure to check (very!) early about any facilities costs that your institution may want to charge ... these can be exorbitant, but can hopefully be avoided/waived. Also be sure to secure a written commitment concerning facility costs, even in the case where no fees will be charged.
 - b. In addition to arranging for suitable rooms for invited and contributed talks, the workshop, panel discussions, Student Jeopardy, the HOM SIGMAA History of Mathematics Student Poster Session (if being held), **space for registration, exhibitors/vendors and the MAA/AMS Book Sales Display** must also be arranged.
 - **Exhibitor space should be closely located to session rooms to give them the traffic they deserve.** *Contact with exhibitors/vendors can also begin in fall semester; see Intermediate Planning, Item 3.*
 - Consult the **Section Student Activities Coordinator** about room specifications for Student Jeopardy, and the **HOM SIGMAA Section Representative** (currently Janet Barnett) about logistics for the History of Mathematics Student Poster Session.
 - Section Project NExT sessions may also require meeting space (and possibly catering assistance) on Saturday afternoon, following the official meeting; this should be coordinated with the chair of Section Project NExT committee.
 - We have also sometimes been requested to arrange for a Saturday luncheon and/or meeting space for CCTM Board on Saturday (following the close of meeting); coordinate with the **CCTM Higher Education Representative** about this.
 - c. In addition to **refreshments for meeting coffee breaks, the reception and the banquet, catering arrangements** may be needed for the following:
 - **Student Lunch** generally held before the official meeting opening; coordinate this with the **Section Student Activities Coordinator**.
 - **Department Chair \ Liaison Luncheon** generally hosted by the host institution's department chair, also before the official meeting opening. In some years, the cost of this luncheon has been paid by the host institution, or by a combination of contributions from the host institution and the section; however, the cost can also be covered by a special registration fee for those who attend the luncheon.
 - See also part (b) above concerning possible food needs for Project NExT or the CCTM Board.
 - d. Parking arrangements may also be required, depending on campus restrictions.
 - e. Any necessary technology arrangements should be made early to ensure availability on day of meeting. In addition to making arrangements for equipment use, also arrange for an IT-type person to be on-call, at least for the first talk session and each of the Keynote Addresses. Arranging for Email access for participants is also always nice, but not necessary.

A-9. **Preliminary arrangements for the meeting reception and banquet** at a location near/on the campus of the host institution **must be made in the fall.**

- The reception and banquet are generally held in the same location, but this is not a requirement.
- If the reception will be held on campus with cash bar, arrangements for a liquor license must be done well in advance; check with your campus catering service.
- Projection equipment will be needed in the banquet room.
- The banquet can be buffet style or plated, but must include vegetarian and gluten free options.
- The per-person banquet cost will need to be finalized for the registration, which is generally launched in January / February. (See Intermediate Planning, Item I-1). Sample costs from recent meetings can be found in registration fee document in the [Meeting Archive](#) on the website.

A-10. **Contact area hotels and motels** for rate quotes and to request that a block of rooms be held for the conference; if possible, also negotiate a reduced conference rate with at least 1 – 2 of these vendors. Conference participants make their own arrangements with the hotels.

A-11. Begin work on the **meeting webpage** and **online registration and payment process**, in consultation with the [Section Webmaster](#).

- The Meeting Webpage (including registration forms) can simply be hosted on the Section website, if so desired. If the meeting website is hosted on a university website, then a link to the meeting website should appear on the Section Webpage.
- It was hoped that a permanent arrangement with an online payment service (Stripe or other) would be in place by AY 2017-18 so that a new registration / payment process does not need to be re-created each year by that year's host institution. As of January 2020, this has not happened. It could be a great service to the section and future host institutions if this effort were renewed.

A-12. Begin work on **program announcement** for the website and for publication in the Spring Section Newsletter. See *Intermediate Planning Item I-1*.

INTERMEDIATE PLANNING (*Work on some of these items can begin in the Fall, and some must be completed in early Spring; they should be completed by early March to ensure Final Planning items go smoothly.*)

- I-1. A **call for papers** and announcement of **registration procedures** should be in place in time to publish an announcement in the Spring Newsletter (**current deadline late January**). Having these processes in place by early January is desirable, and their availability on the Meeting Webpage can be announced via an email sent to all section members by national as soon as they are ready. (Consult with the **Section Secretary-Treasurer** concerning current procedures for sending emails to the section membership.)

Call for papers

- a. The titles and descriptions of any special paper session should be available on the website, as part of the Call for Papers; *see the Program Planning Section, Item P-4, below for more details.*
- b. The deadline for abstract submission should be no later than mid-March. This date should be set in order to allow time for a preliminary program to be organized and announced to all section members at least two week before the meeting date. Setting it a bit earlier than needed allows a little wriggle room to do some additional speaker recruitment (with an extended deadline), in the event that initial abstract submissions are sparse. In addition to a title and abstract, the abstract submission form should allow speakers to indicate if their talk is intended for one of the special sessions (*see Program Planning Section, Item P-4*), and to submit special equipment and/or scheduling requests.
- d. Google Forms have been used to good advantage in recent years for abstract submission. In particular, this makes it easy for the program committee and special session organizers to coordinate.
 - Here is a [sample form](#) that you can try out, to see how this works.
The associated spreadsheet of submissions received is [here](#).
To obtain an editable version of the submission form that you can modify for use at your meeting, contact janet.barnett@csupueblo.edu.
 - See also the sample “Instructions to Special Session Organizers” document in the **Meeting Archive** on the section website, for an overview of how to use the response form to collaborate with session organizers in the preparation of the final program and abstract booklet.
- e. All presentation submissions should be (promptly) acknowledged upon receipt, and again upon scheduling into the program. (To date, the number of proposals has been sufficiently small to accommodate all proposals received by the deadline.) See also the sample “Information for Speakers” document in the **Meeting Archive** on the section website.

Registration Issues -**See also Item A-11 in the Advance Planning section of this Handbook.**

- f. **Meeting and workshop registration fees** must be **approved by the Section Executive Committee**; **banquet fees** should also be **reviewed by the Section Executive Committee**, but must be set to cover the actual cost of the banquet. Special “First time attendee” and “retired” rates seem to have been successful in attracting participants to the 2016 meeting. See the **Meeting Archive** on the website for information about fee structures in recent years. *See also see Budget Issues section of this handbook.*
- g. The **registration form** should allow for online payment of workshops fees (if any), banquet fees, and registration fees, as well as pre-payment for any other activities that carry a fee (e.g., Department Chair \ Liaison luncheon if this is to be paid by a participant fees).
 - Even if there is no charge for the Department Chair \ Liaison luncheon, the form should include a space to register for the lunch in order to get an estimated head count for planning purposes; the same should be done for the Student Lunch, which is always free.
 - If banquet meals will be plated, the form should allow participants to specify their meal choice. The option of purchasing extra banquet tickets (and specifying guest’s meal choice) is also needed.
 - The form should offer the option to contribute Voluntary Section Dues, and to specify preferences concerning which of the following specific section activities are sponsored by the contribution;

Undergraduate Student Initiatives	Graduate Student Initiatives
Section Teaching Awards (DTA, ECTA)	Section Activity Grant Program
Wherever needed most	Other (please specify): _____

Registration Issues - continued

- h. The **deadline for the early registration rate** should be set early enough that a final head count for the Friday Banquet can be provided to the caterer per their requirement.
 - i. The registration form should also collect the demographic data that national requests from sections; see the checklist for more information about requested information <https://www.maa.org/sites/default/files/Programs/Section%20Annual%20and%20Meeting%20Report%20Checklist.pdf> (or contact the **Section Secretary-Treasurer** for assistance.)
- I-2. The **Spring Newsletter Meeting** Announcement should also include all available program information, such as:
- Names and biographies of Keynote Speakers and Workshop Facilitators with their titles & abstracts;
 - Titles of any Special Paper Session with session organizer names and email addresses;
 - Information about panel discussions or other special meeting features that have been arranged to date;
 - HOTEL INFORMATION (room rates, distance to campus, phone numbers, websites). Participants (including invited speakers) are responsible for making their own lodging reservations.
 - Link to the webpage where additional meeting information will be posted as it becomes available
- I-3. **Publicize the meeting** within the section geographic area early, and often.
- Special email announcements can also be made during the spring semester to department chairs and/or department liaisons to further publicize the meeting, remind faculty of upcoming due dates (registration and call for papers), confirm registration numbers, etc. Since not all faculty members are MAA members, this has the potential to reach a different audience than member emails! Contact the **Section Secretary-Treasurer** for assistance with these mailing.
 - Emails to all section memberships are also useful, especially as the meeting date approaches. Again, consult with the **Section Secretary-Treasurer** concerning current procedures for sending emails to the section membership.)
 - The Spring Meeting Announcement should again be distributed as broadly as possible to other regional mathematics/mathematics education professional organizations; *see Advanced Planning, Item A-6.*
 - Arrange for some local publicity (campus newsletter, local paper or radio, etc.) The **Section Secretary-Treasurer** or your campus publicity officer can assist with this.
- I-4. **Contact vendors** (textbook publishers, calculator manufacturers, Zometools, etc) with exhibitor invitations.
- a. This can be done during visits with book reps, by phone, or with a letter, and **may begin in the Fall semester**. Traditionally, materials are displayed on Friday only. The **Section Executive Committee** may be able to assist in making suggestions or vendor contacts.
 - b. A contribution (or exhibitor registration fee) is usually requested to help defray meeting costs. In 2017, a fee of \$150 was requested and gladly donated by all exhibitors. All exhibitors receive a receipt and a letter of thanks from the **Program Chair**.
 - c. Accommodations for exhibitors who wish to display material but are unable to personally attend are left to the discretion of the host institution. If arrangements can be made in exchange for a reasonable contribution, the proceeds go towards meeting expenses.
 - d. Additional donations (e.g., Banquet door prizes, hosting the pre-banquet reception or a coffee break, participant goodies) are also welcome from exhibitors
 - e. An **MAA/AMS Book Sales Display** is also traditional. The **Section Book Sales Coordinator** will arrange for delivery of order forms and display copies to the meeting site. A few students or other individuals from the host institution will be needed to help with the display; consult the **Section Book Sales Coordinator** concerning how many of volunteers and when they will be needed.

I-5. **Prepare the draft budget** for meeting, per the 2018 Section By-laws, Article IV, Item 4:

*At least 3 months prior to the Annual Meeting, the **Program Committee** shall draft a budget of anticipated costs for the meeting. These costs will include any fees for presentation facilities, the banquet facility, supplies, printing, refreshments, and any other known costs associated with running the meeting. The **Program Committee** will suggest participant fees for the banquet, the chairs' luncheon, and registration. The budget and all fees are subject to approval by the Executive Committee.*

See also the Budget Issues section of this Handbook.

I-6. Plan ahead for registration procedures on meeting day.

- A data base should be prepared by early March so that pre-registrations can be processed as they arrive. Careful (multiple) records of incoming registrations, abstracts and banquet requests are needed.
- A volunteer should be put in charge of on-site registration (with assistants as required).

I-7. Make final arrangements for refreshments at coffee breaks with campus food services, and follow up as needed with arrangements for meeting reception and banquet.

I-8. Arrange for dean or other university official to make welcoming remarks at the meeting opening session. (Depending on your institution, this can be done later or earlier.)

FINAL PLANNING *(To be completed in March and early April; many of these items can not be finalized until the call for paper and registration deadlines have passed, but work on them can begin as materials come in.)*

- F-1. Make final banquet arrangements (including final head count to caterer/hotel).
- F-2. Make final reservations for Thursday Executive Committee Dinner (and Department Chair \ Liaison Luncheon also, if one is to be held.) Contact the **Section Secretary-Treasurer** for a head count for the Executive Committee Dinner. Registration forms should provide a head count for the Department Chair \ Liaison Luncheon.
- F-3. Assist **Section Student Activities Coordinator**, as needed, with arrangements for Student Lunch and Student Jeopardy, and also the **HOM SIGMAA Section Representative** (currently Janet Barnett) about the History of Mathematics Student Poster Session (if this is being held). The registration form should be designed to provide an estimated head count for the Lunch.
- F-4. Plan the program! *(See the Program Planning section of this Handbook for details.)*
- F-5. A **final email announcement** to all section members should go out once the full program of parallel talks is ready (ideally about two weeks before the meeting date, and before the Early Registration rate ends).
- A link to a campus map and parking directions, and to hotel information on the meeting webpage, should be included in this announcement, along with a link to the meeting webpage in general.
 - Please also coordinate with the **Section Executive Committee**, the **Section Book Sales Coordinator**, and the **Section Student Activities Coordinator** regarding other special meeting information to include in this email.
- F-6. Arrange for **copying participant materials** (and for stuffing of folders afterwards!)
- The **printed program documents (General, Parallel Sessions and Special Meeting Highlights)** should include times and locations for all activities, along with names and affiliations of all speakers. Student speakers should be clearly indicated as such on the program (along with the distinction of graduate or undergraduate). Samples can be found in the **Meeting Archive**.
 - **Abstract Booklets** need not be very fancy (double sided paper, stapled in upper left-hand corner, title page with host institution and \or section \national logo displayed.) Printing costs can also be controlled by limiting the abstract length to 100 words. Exhibitors and other financial supporters should be acknowledged.
 - A campus map as well as a building **map** indicating room locations should also be available the day of the meeting.
 - The **Section Book Sales Coordinator** will supply an electronic copy of the **MAA Book Sales Catalog** for printing and inclusion in the participant folders (or s/he may make copies at his/her own institution and bring them to the meeting to be handed out at registration – please check).
 - The **Section Secretary-Treasurer** will provide electronic copies of the **Section Business Meeting Agenda and Minutes** for printing and inclusion in the participant folders.
 - It is recommended that a local map and list of nearby restaurants be included on the website and/or in the participant packet. In particular, vegetarian and gluten-free lunch options are much appreciated!
 - There will inevitably be last-minute changes, so printing should be delayed as long as is reasonable; an **errata sheet** can also be provided at the registration table as needed.
- F-7. Arrange for **table set-up** in exhibitors, registration and refreshments.
- F-8. **Confirm various campus arrangements** (room assignments, parking, refreshments, etc.)

- F-9. **Prepare registration materials:** name tags, folders, receipts, programs, maps, abstract booklets, MAA book sales catalogs, freebies (if any; these could be items such as pencils and pads contributed by vendors or host institution; in 1997, MatLab contributed T-shirts to meeting participants; in 2016, Enstrom candies donated small boxes of toffee for meeting participants). Brochures on the Distinguished Teaching Award, the Section Activities Fund, and voluntary dues forms may also be provided by the [Section Secretary-Treasurer](#) for display at the table (or inclusion in the packet).
- F-10. **Prepare wall posters** for directions and an enlarged copy of each room's schedule to be posted the day of the meeting.
- F-11. **Schedule moderators** for each room where talks will be given to announce speakers and keep the session on time.
- Typically, the organizers of a special paper session will also moderate that session.
 - Moderators should check equipment and set-up in room prior to the start of the session.
 - A sample "Moderator \ Session Organizer Instructions" document can be found in the [Meeting Archive](#).
- F-12. **RELIABLE volunteers** are also needed to take responsibility for each of the following jobs the day of the meeting: on-site registration, IT assistance MAA Book Sales, Coffee Breaks. (Ideally, the [Program Chair](#) should be relatively free during the meeting to handle unexpected problems, or even attend a talk!)
- F-13. Make arrangements (in conjunction with the [Section Secretary-Treasurer](#)) for individuals to **introduce invited speakers** (Keynote, Polya, etc.)
- Typically, the nominator of the previous year's DTA recipient will introduce the DTA Invited speaker; this contact should be made in advance.
Other invited speakers are generally introduced by one of the Section Officers; often, this is decided at the Executive Committee Meeting on the Thursday evening before the meeting.
 - The vitae of invited speakers should also be obtained in advance so that introductions can be planned; contact the [Section Secretary-Treasurer](#) or [Section Chair](#) for assistance with this.
 - National speakers should also get a bit of extra attention, or at least the offer of such attention. In some cases, they don't know anyone in the section, and meeting programs vary tremendously from section to section. It is nice to have someone tagged to make sure that national speakers are being looked after, introduced to other section members and just generally made to feel welcome. The person tagged to do this could be a section officer, a local program committee member, or just someone who is active in the section and perhaps already knows the speaker from somewhere else.
- F-14. Some items that are useful at the registration table include:
- extension cords
 - extra batteries for microphones, projection slide advancers
 - markers, pens, pads
 - white board markers, chalk
 - cash box
 - laptop or paper registration forms for on-site registration
 - registration list, volunteer list
 - duct tape, scissors
 - cell phone numbers for IT, catering, etc., just in case of last minute crises

PROGRAM PLANNING

- P-1. It is desirable to include both “research” and “teaching” talks in the program, but with somewhat more emphasis on teaching talks in keeping with the MAA’s mission. Features of interest for students, two-year college teachers and secondary mathematics teachers should also be arranged. Panel discussions are always popular features, as well. Again, Section officers and department liaisons can be of assistance with this.
- I-9. The titles of contributed paper session that have been somewhat standard in recent years follows, but any special session topic that the program committee feels will be of interest is fine. In addition to a requesting special paper session proposals in the Fall Newsletter, it is worthwhile to send out an email in early January to all section members. (Again, consult with the [Section Secretary-Treasurer](#) concerning current procedures for sending emails to the section membership.)
- *History of Mathematics*
 - *Mathematics Education*
 - *Interesting Ideas in Mathematics* – this involves expository talks on mathematical topics
 - *Inquiry Based Learning Methods in the Classroom*
 - *Mathematics for K-8 (or K-12) Teachers*
 - *Dynamical Systems* (or some other specific mathematical topic)
 - *Teaching Modeling Across the Curriculum* (or some other teaching specific topic)
 - *Regional Mathematics Experiences in Business, Industry, & Government*
 - *Undergraduate Paper presentations* (organized by the [Section Student Activities Coordinator](#))
 - *Research by Graduate Student* – contact the [Section Secretary-Treasurer](#) / [Section Chair](#) to ask whether the section continues to offer \$100 in travel funds for one doctoral student speakers from each graduate program in our section
 - *General Session* – everything else ends up here by default
- P-2. The MAA National Office suggests encouraging members of the section who are known to be good speakers to give a presentation. Department liaisons could be used to identify and help recruit such individuals. Contact [Section Secretary-Treasurer](#) for assistance in sending out a notice to liaisons.
- P-3. Encourage speakers to give careful attention to the title of their talks; a well-chosen title can greatly increase the audience. See also the “Suggestions for Speakers” sample document in the [Meeting Archive](#) on the webpage.
- P-4. Allow time for informal get-togethers, and at least 5-minutes between talks. At least one “coffee break” each day, with refreshments provided, must be part of the meeting program!
- The remaining items in this section of the Meeting Handbook are based on the most recent tradition of a Friday/Saturday Meeting. At the time of this update, there was discussion within the Executive Committee about possible alternative schedules, at least in some years for some host institutions.***
- P-5. Meetings typically begin at 1 p.m. on Friday (± 1 hour) and end around 12 p.m. on Saturday (± 1 hour).
- P-6. Optional workshops can be scheduled either before or after the timeframe of the official meeting (e.g., Friday morning or Saturday afternoon); Friday morning workshops have been the norm for some time. *An additional workshop fee can/should be charged to defray the costs of workshop materials and refreshments, registration & banquet fees for workshop facilitator(s) and one-night lodging for workshop facilitators, if necessary, but should not be so high as to discourage participation in the workshop. Notice of and payment options for such fees should be part of the registration form.*
- P-7. The Executive Committee Meeting is generally held on Thursday evening over dinner at a local restaurant chosen by the [Program Chair](#); attendees pay for their own meals. It is important that the selected restaurant have a quiet space, so that the meeting itself can be easily conducted. Consult with [Section Chair](#) and Secretary concerning times and number of guests in order to make the necessary reservation. The [Section Chair](#) and Secretary will also prepare the meeting agenda.

P-8. Program activities for Friday include:

- Friday morning pre-conference workshop.
- Department Chair \ Liaison Luncheon and Student Lunch prior to official meeting opening, if desired.
- Friday afternoon scientific program, including
 - Welcoming remarks by a representative of the host institution.
 - Opening talk (45-minutes) by the previous year's Distinguished Teaching Award recipient.³
 - The standard **talk length for contributed talks** has been **20-minutes**, but requests for longer talks can be accommodated at the discretion of the local program committee.
 - "Closing" invited talk (if any).
- History of Mathematics Student Poster Session display and judging (if this is being held); judging might instead take place on Saturday, depending on other program details.
- At least one 15 – 20 minute "coffee break", with refreshments served.
- A Department Liaison meeting has sometimes been held between the last talk and the reception.
- Pre-banquet reception, paid by host institution or exhibitors contributions, or with a cash bar.
- Friday Banquet.
 - Every effort has been made in recent years to **avoid a prominent head table**. It can, however, be useful to reserve a table near the front of the room for the Keynote Speaker and those officers who are part of the banquet program. (It is also helpful to have the DTA and ECTA recipients identified and coordinated so they can easily get to the presentation area. This can be done by the Past Chair or Chair-Elect, who will introduce the nominators at the banquet.)
 - Prior to the Banquet Talk by the Keynote Speaker, there is a short program in order to:
 - make necessary meeting announcements, if any
 - present 25/50-year member certificates (the **Section Secretary-Treasurer** brings these). The following groups may also be recognized: winners of the History of Mathematics Student Poster Contest, student speakers, departmental liaisons, section officers
 - present the Distinguished Teaching Award and the Early Career Teaching Award to the new recipients; this is typically done by the Chair of the Section Awards Committee.
 - after the talk, there are typically door prizes (arranged by the **Section Book Sales Coordinator**)

P-9. Program activities for Saturday include:

- Business meeting at 8:00 am (followed by refreshments) on Saturday morning. The Section **Secretary-Treasurer** and **Section Chair** prepare the agenda for this meeting.⁴
- Saturday morning scientific program, including
 - Keynote Speaker following the business meeting.
 - Parallel sessions of contributed talks and panel discussions and Student Jeopardy; basically the same details as for Friday, except for Student Jeopardy which will run 1 – 1.5 hours.
 - Closing invited talk (if any)
- At least one 15 – 20 minute "coffee break", with refreshments served.
- History of Mathematics Student Poster Session display (and possibly also the judging, if this isn't scheduled for Friday); if possible, the posters are displayed both days.
- In some years, there may be a Section NExT or other workshop, following the official close of meeting.

³ A reminder from **Advance Planning Section of this Handbook (Item A-5)**: In Summer 2017, there was considerable discussion concerning how the previous year's recipient of the **Early Career Teaching Award (ECTA)** would be honored at the meeting; it was generally agreed that the recipient would NOT deliver an invited talk. At the 2017 and 2018 meetings, different approaches were used to honor the ECTA recipient. Please consult the Section Executive Committee concerning a possible permanent decision in this regard.

⁴ **Please consult with the Section Executive Committee concerning whether there is an interest in trying a different time for the business meeting.** For instance, at the Spring 2017 Business Meeting, there was discussion of changing the time of the business meeting to late Friday afternoon. In 2018, the business meeting was held over lunch on Saturday (although there were several other modifications in the schedule that year, due to its location).

BUDGET ISSUES

- B 1. The budget varies considerably from year to year; samples from several past meetings are in the [Meeting Archive](#).
- B 2. A budget reporting form is included in this Handbook, with an Excel version posted on the website. This report must be filed with [Section Secretary-Treasurer](#) no more than 4 weeks following the close of the meeting.

- B 3. Per the 2018 [Section By-laws, Article IV, Item 4](#):

At least 3 months prior to the Annual Meeting, the [Program Committee](#) shall draft a budget of anticipated costs for the meeting. These costs will include any fees for presentation facilities, the banquet facility, supplies, printing, refreshments, and any other known costs associated with running the meeting. The [Program Committee](#) will suggest participant fees for the banquet, the chairs' luncheon, and registration. The budget and all fees are subject to approval by the Executive Committee.

- B 4. **Revenue to support** the meeting comes from the following sources:

- **Section Subsidy:** The amount of the section subsidy varies from year to year, and should be established in accordance with 2018 Section By-laws, Article IV, Item [4](#) (see Item B.3 above).
It is generally understood that, in years when the meeting takes place in more distant locations, there will be fewer registrants and perhaps a greater need for an additional section subsidy.
- **Registration Fees:** These fees must be approved in advance by the [Section Executive Committee](#); a summary of the fee structure for recent meetings is included in the [Meeting Archive](#). Remember that registration fees are waived for invited speakers and workshop facilitators, as well as for DTA and ECTA nominees and nominators.
- **Host Institution Contributions:** This amount has varied considerably in recent years; see sample budgets in the [Meeting Archive](#).
- **Exhibitor Contributions:** The “asking” amount of this contribution will be set as part of the meeting registration, but has been in the \$100 - \$150 range in recent years. In addition to defraying meeting costs, exhibits also contribute greatly to a good meeting. Early contact with representatives can definitely pay off. Always offer the opportunity to sponsor a refreshment break (or to otherwise donate to the meeting), especially if a vendor's representative cannot actually attend. The company name of any such sponsor should then prominently displayed at the meeting, and in the Fall Newsletter Meeting Report.
- **Banquet, Workshop and Other Activity Fees:** Fees for these extra meeting activities should be set to cover all expenses of the associated activities for those individuals who sign up to participate.
 - The workshop fee should also be set to cover the meeting registration fee and travel costs for the Workshop Facilitators.
 - In setting the banquet fee, remember that all invited Keynote Speakers, the Workshop Facilitators, the new Teaching Award recipients and their nominators all have their banquet fee waived; depending on how many speakers/facilitators there are, this could involve 6 – 10 comped meals to cover.

B 5. The above revenue sources should suffice to cover the following usual meeting expenses; extra freebies can be supported through extra (individual, host institution or vendor) contributions as desired. Although the Section Meetings are not intended to be a money-maker for the section, it is also hoped that they will be self-supporting.

- **Supplies and Equipment:** Nametags, folders, copy costs, receipts for participants
- **Local Expenses Costs for Invited Keynote Speakers, including Burton W. Jones DTA Speaker**
 - Meeting Registration Fee and Workshop Fees, if the visitor elects to participate in this
 - Cost of any associated social events (e.g., Banquet Fees)
- **Travel and Meeting Expenses for Invited Workshop Facilitators**
 - Local expenses as above: Meeting Registration Fee and Banquet Fees
 - One night lodging, if required by the need to arrive a day or more early for the meeting.
- **Banquet Fees for 'new' DTA and ECTA recipients and their nominators**

The Section Award Committee Chair will provide names and contact information for these four individuals.
- **Catering :**
 - Refreshments for each coffee break (*at least* one break per day of the meeting)
 - Department Chair \ Liaison Luncheon, if any
 - Friday Evening Reception (typically funded by registration fees, vendor contributions and/or a cash bar)
 - Friday Evening Banquet (supported by Banquet fees paid by participants)

POST-MEETING DUTIES OF PROGRAM CHAIR

- PM 1. File Budget Report with Section Treasurer no more than 4 weeks following the Section Meeting.
- Prepare this using the Excel version posted in the [Meeting Archive](#);
 - Also send a copy of the final budget report (converted to pdf) to the [Section Webmaster](#) for posting in the [Meeting Archive](#)
- PM 2. Provide [Section Secretary-Treasurer](#) with list of individuals who made a Voluntary Dues or other financial contribution to the meeting, along with the contribution amount, so that a tax-deduction letter can be sent to contributors
- PM 3. Prepare Meeting Reports for:
- a. the Section Website: this one should be brief, but include photos if you can!
 - b. the national MAA Committee on Sections: for a checklist of information needed, see <https://www.maa.org/sites/default/files/Programs/Section%20Annual%20and%20Meeting%20Report%20Checklist.pdf>; the reporting form itself is available at <https://www.maa.org/programs-and-communities/member-communities/maa-sections/deadlines-and-forms> ;
 - c. the Fall Section Newsletter: in addition to a list of talks presented at the meeting, this report should include attendance figures (total, faculty and student) and speaker information (number of faculty speakers, number of student speakers.) See past newsletters on website for sample reports.
- PM 4. Update this Meeting Handbook, and send first to the past two [Program Chairs](#) for their review and feedback; then send to [Section Executive Committee](#) for their review, and their approval of any new financial statements recommended for incorporation. Any recent change to the Section By-laws that would affect Meeting Organization should also be incorporated at this time. Once all reviews are complete, send final version to [Section Webmaster](#) for posting on or before June 30.
- PM 5. Prepare to enjoy next year's Section Meeting when you will no longer have [Program Chair](#) duties!!

Addendum – Special Advice from Former Program Chairs

- **From Tracii Friedman, 2016 Program Chair**

Kyle got in touch with me about 2.5 years ahead of time, partly because he's amazing and partly because it was the joint meeting. It was great because our UC gets booked up really far in advance by admissions and academic affairs. It would have been a HUGE challenge for us to have hosted if we had not booked the space that far in advance. In short, I think that as soon as a department knows it's hosting, they should book the space and confirm what, if any, fees there will be for use of the space. In the case of the joint meeting, contact should also be made with Intermountain Section to ensure that they are still interested, etc.

- **From Janet Barnett, 2017 Program Chair**

Be sure to reach out to exhibitors early – they get pretty busy in the spring as well, so don't delay on this. Also do some personal outreach to some of the junior "early career" faculty in the section, with invitations to organize a special session or give a talk. This is a gentle way for them to get involved in section activities, doesn't hurt their vita and can greatly enhance the meeting program.