

REQUEST FOR PROPOSALS TO HOST THE 2020 ANNUAL FORUM

Proposals need to be submitted to Executive Vice President, James Nolan at james.nolan@usask.ca by close of business March 1, 2018. Council will decide the winning proposal by March 31, 2018.

- In 2016 TRF adopted a new strategic plan that described a financially sustainable model for the annual forum. The plan also recommended changes to the format of the annual forum to enhance its value to members. This has led to a shorter, more tightly scheduled program, and greater controls on the quality of sessions.
- Council also expressed a desire that the annual forum should complement the activities of geographic chapters by holding the meeting every other year in a city with a geographic chapter. The 2017 and 2019 annual forum will be hosted by the Chicago and Washington DC Chapters, respectively, and Council would look favorably on a bid for the 2020 annual forum from a non-chapter city.
- Council will look favorably on a bid by a city that is either currently forming, or is considering forming, a local chapter. We wish to use the annual forum to support formation of additional local chapters.
- The head of the winning bid team would serve on Council as the TRF VP Programs-elect during 2018-19, and as the VP Programs in 2019-20.
- While TRF's central management services (currently provided by Jolie Estes of Innovative Management Solutions) will provide web hosting and financial management services (such as registration and accounts payable), the local organizing committee will have the primary responsibility to decide on meeting rooms, hotel block reservations, catering, social events and tours.
- Council wishes to minimize the financial risk exposure, and decided not to enter into contracts with hotels for to guarantee a specified number of hotel rooms for attendees. This means that the meeting rooms are unbundled from hotel bedroom reservations.
- If the conference is hosted by a current or prospective TRF geographic chapter, Council will be open to discussions on the division of revenues and financial risk between the local chapter and the national TRF.

- Attached to this RFP are appendices detailing the relevant sections of the 2016 strategic plan, and details on the organization and pricing of the 2017 Chicago annual forum that was organized consistent with the new strategic plan.

SUBMISSIONS

- A single PDF file with the proposal should be submitted to Executive Vice President, James Nolan at james.nolan@usask.ca by close of business March 1, 2018.
- The submission should contain:
 - Proposed dates and host city
 - An indication as to why this venue would be very attractive to a wide range of TRF members
 - The name of the chair of the bid committee (who will serve as VP Programs elect during 2018-19, and VP Programs in 2019-20), and members of the local organizing committee
 - Identification of the venue for the meeting. In general the meeting requires:
 - Auditorium for 200-250 people
 - Three or four break out rooms equipped with presentation facilities for about 50 people each
 - Space for poster session(s) and catering
 - Identification of potential hotels for attendees and their price range
 - Discussion of other activities such as social events, tours and the like
 - Discussion of the benefits and any challenges that attendees would face in traveling to the conference venue
 - Discussion of how abstract and paper submissions would be handled (the 2017 annual forum used the “Conference Maker” software, but alternative handling arrangements are possible)
 - Bidders may deviate from the 1.5 day structure described in the strategic plan, but would need to describe and justify any variations
 - The proposed registration pricing structure
 - An estimated budget
 - Details on any innovating revenue and risk sharing arrangement, including the sharing of any sponsorship revenues
 - Discussion of the sharing of administrative tasks between the local organizing committee, the national TRF Council, and its central administrative services.
- Council recognizes that these initial bids are inherently uncertain at this point and that contracts for venues and services will not have been entered into and fully priced. Council will evaluate bids based on their attractiveness to potential attendees, the likelihood that the bidder can deliver on their proposal, and the financial risks.

APPENDIX A

Extract from the TRF Strategic Plan adopted May 2016 concerning the annual meeting.

4. Annual Conference

The committee has a number of restructuring proposals to restore financial stability to the annual conference, clarify the relationship between the central administration and the program chair and the local organizing committee, improve the intellectual and academic quality of the conference, and expand conference participation.

- 4.1 The committee believes that greater synergies between the national organization and the local chapters will occur by holding the annual conference at least every other year in a city with a TRF geographic chapter. This has the dual benefit of providing increased value to local chapter members, as well as harnessing the resources of the local chapters to form part of the local organizing committee for the conference. *Timeline: to start with the 2017 annual conference.*
- 4.2 TRF's VP-Programs will organize the annual conference and will chair a local organizing committee. This committee will arrange for (a) the program content, (b) booking of meeting rooms, (c) making logistical arrangements for meals, and (d) making arrangements, as appropriate, for discounted room rates at local hotels. In a steady state or idealized world, we envision that TRF council will receive proposals for a conference venue two years in advance. *Timeline: the venues for the 2017 and 2018 conferences to be discussed at the May 2016 Council Meeting. Then the venue for 2019 to be discussed in 2017, and so on.*

It is proposed that recommendations 4.3 to 4.10 are to be effective with the 2017 conference.

- 4.3 For all future conferences and given recent experiences, the organizing committee will not provide hotel room guarantees. The committee recognizes that this will have cost implications for attendees (e.g. room rates will be higher for participants, as may be the costs of session rooms, food, and related items) but we believe that higher cost to participants will not significantly affect attendance and that any increased session and related costs are worth it to reduce the probability and magnitude of devastating conference deficits that have occurred recently.
- 4.4 The committee recommends that the local organizing committee is not only responsible for the program but also for the arrangements related to receptions, poster and parallel sessions, luncheons, breaks, food, and related activities. This is in line with the expectations and practices of local organizers in many similar academic conferences. In addition, the local organizing committee has the local knowledge to make arrangements for room blocks at local hotels, and for booking meeting rooms. Rooms for keynote addresses, awards luncheons/dinners, and sessions should be appropriate for a professional meeting.

- 4.5 The committee recommends that the TRF central administration continue to provide (a) abstract submission and paper management software (either in-house or through commercial vendors), (b) registration fee payment (again either in-house or through commercial vendors), and (c) accounts payable services to vendors of meeting rooms, catering and the like.
- 4.6 The committee recommends: (a) that the TRF Council establish immediately an explicit incentive-compatible model for financial risk-sharing arrangement between the national TRF and the local organizing committee for any profit or loss that occurs; (b) that there are explicit agreements regarding the division of sponsorship revenues between the national TRF versus the local organizing committee as part of the risk sharing arrangement; (c) that the TRF Council make explicit the process for the setting of registration fees; and (d) that this financial model be established in cooperation with the local organizing committee for the 2017 conference, and be reviewed in 12-months' time in light of the experienced gained.
- 4.7 The committee recommends that, excepting any additional joint conferences between TRF and CTRF, the annual conference moves to a 1½ day format. The first day starts in the afternoon with sessions aimed at graduate student researchers. The main part of the conference starts in the early evening with a combined reception and poster session. The second day becomes a full-day of plenary and parallel sessions that concludes with a dinner or social event in the evening.
- 4.8 The committee recommends that by providing a forum for sympathetic yet rigorous feedback on the work of graduate students TRF would exploit a niche that other organizations do not adequately serve. Moreover, this would serve as a great recruiting tool moving forward for TRF. The committee also recommends that Council approach the TRF Foundation to help support this activity (e.g. through reduced rate registrations and prizes). Activities such as these could be cited by the Foundation in their future fundraising activities.
- 4.9 The committee believes that academic papers in the main part of the conference should be of a higher caliber. To develop a sustained model of high caliber sessions, the committee recommends that the local program organizer be selective in abstract acceptance, enforce a hard cutoff for submission of the full paper, appoint discussants for the academic papers, and that the complete papers are made available to discussants and attendees in advance on a protected website. In addition, high quality industry and government papers and panel presentations are welcome but would not be held either to the same standard as academic papers or to the timeline for advanced submission of the full paper.
- 4.10 We recommend that TRF continues to waive any copyright on papers submitted and presented so that authors are free to submit their papers for peer-review journal publication (including to JTRF). After 12 months, TRF will archive the conference proceedings and make them publicly available consistent with the next recommendation.

- 4.11 The committee recommends digitizing the entire back holdings of the TRF annual forum proceedings. This is a critical and urgent task to ensure against loss of all paper copies. It is unlikely (but not impossible) that this will be part of the commercial publishing agreement for JTRF. The committee recommends that the Council approach the TRF Foundation to fund digitizing the proceedings and to find a University library, or similar institution, to host the archive. This requires that the TRF Council relinquish any past copyrights so that the archive is accessible to all at no charge. *Timeline: immediate.*

APPENDIX B

Website for the 2017 Annual Meeting organized consistent with the 2016 Strategic Plan:
<http://sites.northwestern.edu/trf2017/>

Registration pricing structure:

Early Bird Registration (January 3 – March 17, 2017)

- \$200 TRF Members
- \$260 Non-Members (includes 2017 TRF membership)
- \$100 TRF Student Members
- \$130 Student Non-Members (includes 2017 TRF membership)
- \$75 Discounted rate for local chapter members

Regular Registration (from March 18, 2017 and on site)

- \$230 TRF Members
- \$290 Non-Members (includes 2017 TRF membership)
- \$130 TRF Student Members
- \$160 Student Non-Members (includes 2017 TRF membership)
- \$105 Discounted rate for local chapter members

Registration fees include admission to all sessions at the main conference, and the graduate-student focused sessions on Thursday afternoon. The fee also includes coffee breaks, the networking reception, light breakfast on Friday, and the awards luncheon. A Friday evening social event is available at an additional fee of \$30. There is no charge for the Saturday tours, but participants will be responsible for their own local transportation to and from the tours.