



## 2024 SMS Conference Extension Guidelines

### OVERVIEW AND REQUIREMENTS

We invite you to organize a SMS Conference Extension! The following provides an overview of the structure and requirements of these topical workshops held in conjunction with the SMS Annual Conference:

- Takes place at a venue that is within 1-2 hour's travel time of the SMS Annual Conference location, or is held virtually.
- One-day event, approximately 6-8 hours of programming (*virtual Extensions are allowed shorter durations*)
- Held within 3 days prior to or following the SMS Annual Conference (*virtual Extensions may be held up to 10 days before the conference*). No Extensions will be held during the Annual Conference.
- A very limited number of Extensions will be offered; we anticipate around 4-5. Proposed Extensions will be reviewed and selected by the Conference Program Chairs.
- In addition to the requirement that Extensions have a thematic tie to the Annual Conference theme, there are two new selection criteria that the Program Chairs will look for:
  - Demonstrated thematic tie to one of the [Six Big Questions of Strategic Management](#)
  - Strong practitioner-involved programming, such as a visit to a local corporate headquarters or academic-practitioner roundtables
- For your Extension to be considered, please submit your plans using the [online submission form](#), which collects information on prospective organizers, theme, dates, location, and costs, by **February 21, 2024**. Below please find additional details that will help in creating your proposal.

### PROGRAM AND ORGANIZERS

Each Extension should have a few key people (2-4) to serve as the organizing committee. The committee members will be responsible for the program content and the logistical arrangements of the Extension. Each Extension organizing committee will create a theme and program that typically consists of discussions with invited panelists and other workshop elements. Extensions should not have a Call for Proposals or a submission process.

### ATTENDANCE

We expect approximately 30-60 attendees per Extension. We assume the Extensions will be composed of 10-20 participants who also attend the SMS Annual Conference, plus 20-30 local participants, who would use these Extensions to interact with individuals from the SMS Annual Conference. Engagement of local participants is a primary purpose of SMS Extensions, so organizers will be asked to demonstrate how they will achieve local participation.

### FEES AND BUDGET PLANNING

In-person Extensions should be planned to include coffee breaks and a group lunch; a group breakfast or dinner is an option to be considered at the organizers' discretion. SMS will provide the Extension's registration revenue on a reimbursement basis post-event, less a \$25 per registrant administrative fee. For example, if the available Extension revenue, after the SMS fee, was \$5,000, but the Extension expenses were only \$3,000, only \$3,000 will be disbursed. On the other hand, if the available Extension revenue, after the SMS fee, was \$3,000, but the Extension expenses were \$5,000, only \$3,000 will be disbursed.

All Extension participants must register through the SMS website. Organizers may set their Extension registration fees as they see fit to cover anticipated expenses but note that this is subject to review by the selection committee. The hosting institution is expected to provide meeting space, AV, and logistical/administrative support as part of its sponsorship of the Extension. Organizers may seek additional sponsorship as needed. Virtual Extensions should be hosted on a platform selected and managed by the Extension organizers.

When proposing your registration rates, please include a SMS Member rate that is 20% less than the non-member rate. For organizers who do not anticipate any expenses or do not wish to receive a revenue reimbursement, the base registration fee will be set at \$25 to cover SMS administrative costs.

#### LOGISTICS AND REGISTRATION

All Extension attendees must register through the Extension webpage hosted on the SMS website. The organizers should provide logistical information for attending the workshop, and can provide assistance for accommodation and travel. This information will be included on the SMS website, and participants will be responsible for making these arrangements on their own.

#### MARKETING

Extensions will be featured on the SMS Annual Conference website and will be promoted to members via email as part of the Annual Conference promotional schedule (see below). Organizers should plan to supply updated Extension information according to the below schedule; the SMS Office may be unable to accommodate one-off updates to the Extension website. Additional local announcements and marketing of the event by the organizers or host institution to attract local participants is required. Each organizing committee will be asked to provide SMS with their marketing plans for the Extension, which should include at least three promotions. Marketing materials carrying the SMS logo and name should be made available to the SMS Executive Office for review prior to the information being made public.

#### TIMELINE FOR ACCEPTED EXTENSIONS

Early March	<ul style="list-style-type: none"> <li>• Extension Acceptance Decisions Announced</li> </ul>
March 29, 2024	<ul style="list-style-type: none"> <li>• Finalize Extension theme &amp; description of program for SMS Extensions webpage</li> <li>• Finalize and confirm Extension date/time and initial logistics (including registration fees) to be shared on the SMS Extensions webpage</li> <li>• Confirm organizing committee and send biographies and pictures for webpage</li> <li>• First Extension promotion to be distributed in early April (both by SMS Office and locally by organizers)</li> </ul>
Mid-April	<ul style="list-style-type: none"> <li>• Extension Registration Opens; Extensions promoted in conjunction with Annual Conference registration</li> </ul>
June 12, 2024	<ul style="list-style-type: none"> <li>• Finalize Extension panelists &amp; speakers; Send panelist biographies (100-150 words) and pictures for SMS Extensions webpage</li> <li>• Send additional details for SMS Extensions webpage such as hotel options, transportation information, etc.</li> <li>• Tentative program and agenda available for SMS Extensions webpage</li> <li>• Second Extension promotion planned for to be distributed late June/early July</li> </ul>
August 1, 2024	<ul style="list-style-type: none"> <li>• Finalize Extension program/schedule of events</li> <li>• Final updates to the SMS Extension website</li> <li>• Distribute final two promotional emails (mid-August and early September)</li> </ul>
October 1, 2024	<ul style="list-style-type: none"> <li>• Extension Registration Closes</li> </ul>