2025 SMS Conference Extension Guidelines

OVERVIEW AND REQUIREMENTS

We invite you to organize a SMS Conference Extension! These topical workshops held in conjunction with the SMS Annual Conference offer a deep dive into certain aspects of the conference theme. The following provides an overview of the structure and requirements of these events:

- 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 collaboration with key SMS Board committees as needed.
- In addition to the requirement that Extensions have a thematic tie to the Annual Conference theme, there are two additional 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 19, 2025**. 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. Ideally, Extensions will be composed of 30-40% participants who also attend the SMS Annual Conference, and 60-70% local participants, who would use these Extensions as an opportunity 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. Additionally, practitioner engagement is a goal of SMS Extensions. Organizers should aim for at least 20% practitioner attendance as well.

REGISTRATION, 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. The hosting institution is expected to provide meeting space, AV, and logistical/administrative support as part of its sponsorship of the Extension. Virtual Extensions should be hosted on a platform selected and managed by the Extension organizers.

SMS will provide the Extension's registration revenue on a reimbursement basis post-event, less a $25 per registrant administrative fee, based on Extension expenses. 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. Organizers may seek additional sponsorship as needed.

When proposing your registration rates, please include an SMS Member rate that is 10-20% 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 to networks outside of the existing SMS community. 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.

DELEGATION OF RESPONSIBILITIES
The following is an overview of how Extension responsibilities will be divided between the SMS Office and the Extension organizers.

Extension Organizers
- Developing program content
- Coordinating with speakers
- Managing logistical arrangements
- Managing expenses and vendor payments
- Marketing Extension to local community
- Attendee communications and customer service
- Sponsor relations, if applicable

SMS Office
- Hosting and updating the official Extension webpage
- Receiving and reporting on registration
- Registration technical support
- Marketing Extension to SMS community
- Post-conference revenue disbursement

TIMELINE FOR ACCEPTED EXTENSIONS

Mid-March	• Extension Acceptance Decisions Announced
April 1, 2025	• Provide an update on Extension program plans and speaker confirmation progress, based on feedback provided by Program Chairs
April 10, 2025	• Finalize and submit Extension details to be published on the SMS website including: date, venue/location, theme & description of program, timeframe and/or tentative agenda, sponsor info/logos, registration fees, and any other initial logistics
Mid-April	• Extension Registration Opens; Extensions promoted in conjunction with Annual Conference registration • First Extension promotion to be distributed locally by organizers
June 12, 2025	• Finalize Extension panelists & speakers and provide additional details for SMS Extensions webpage such as hotel options, transportation information, etc. • Tentative program and agenda available for SMS Extensions webpage • Second Extension promotion planned for to be distributed late June/early July
August 1, 2025	• Finalize Extension program/schedule of events • Final updates to the SMS Extension website • Distribute final two promotional emails (mid-August and early September)
September 25, 2025	• Extension Registration Closes • Distribute "know before you go" details to registrants