Military Operations Research Society
Special Meetings (Sp Mtg) Tutorial

How to Lead a Successful Special Meeting:
Team Responsibilities
After completing this module, the prospective Special Meeting Chair will learn their team members:

- Support Team
  - Executive Council, VP(MO), Special Meeting Committee Chair, Proponent Sponsor, MORS Office, and Publications Committee
- Planning Committee
  - Special Meeting Chair and Co-Chair, Technical Chair and Co-Chair, Working Group Chairs and Co-Chairs, Synthesis Group, and the MORS Bulldog
- Industry Marketing Partners

Additionally, based on the information presented in the Special Meeting Background and Types modules, the Special Meeting Chair will also learn the specific team member’s responsibilities.
Sp Mtg Team: Overview

• Organizing and running a MORS Special Meeting has many rewards, but it entails many challenging responsibilities.

• There are many people that are going to assist you leading a special meeting
  – Supporting People: those that assist because of their position / relationship with MORS
  – Planning Committee: those that you solicit to help you run a successful meeting
  – Industry Marketing Partners: those applicable organizations that may be interested in participating
The Executive Council will approve the Special Meeting Chair:
- If the Chair is not familiar with MORS, a Director may be appointed by the Council as an Advisor to the Chair
- For meetings that are co-sponsored with other organizations, considerations will be given to having a co-chair(s) appointed by the Council

The Council will review and approve the TOR together with its budget and fee

The Council is ultimately responsible for the quality of all written and oral products of any MORS meeting
Sp Mtg Support Team: VP Meeting Ops

- The Vice President for Meeting Operations [VP(MO)] is responsible for the overall supervision of meeting-related operations of MORS
- The VP(MO) is responsible for the advancement of a Special Meeting from initial concept to the concept approval stage
- In conjunction with the CEO
  - Control the number and type of special meetings
  - Monitor the current status of special meetings being initiated, executed or reported
  - Review all special meeting policies and recommend changes
- For each Special Meeting, the VP(MO) will
  - In coordination with the Sponsor(s) and the MORS Office, review and recommend the TOR for approval by the Executive Council
  - Oversee the quality control and implementation of special meeting products
  - In coordination with the Executive Council and the Special Meeting Committee Chair, obtain follow-up report from Sponsor(s) to evaluate impact and implementation of special meeting products
• Working with their committee, is responsible for the advancement of a slate of prospective special meetings for the current and following MORS year.
• Will maintain a log to track the development and planning of special meetings for a two-year period. At a minimum, anticipate:
  − Shortfalls, and
  − Unmet requirements (Chair, Sponsor / Proponent, TOR, Organizing Committee, etc.) will be identified
• Will be selected for the MORS year by the President and President-Elect.
• Is encouraged to develop ideas for MORS years beyond the two-year focus.
• Is responsible for setting policy and procedures for special meetings, while developing and maintaining a lessons learned log.
Working with the Special Meeting Committee Chair and their committee, is responsible for the advancement of a slate of prospective special meetings for the following MORS year (their President Year).

The Special Meeting Committee Chair and President-Elect will prioritize a list of proposed special meetings to present to the Sponsor’s Lunch in the winter.

During the Sponsor’s Lunch, the President-Elect will present their proposed slate of Special Meetings for their President year.

- The Special Meeting Committee Chair will provide support, as needed
Sp Mtg Support Team: Sponsor / Proponent

• May be requested to review and concur in the selection of the Special Meeting Chair and the TOR.
• Will be requested to assist the Special Meeting Chair by:
  - Encouraging appropriate participation by their respective activities and organizations,
  - Attending or being represented at organizing committee meetings to help keep goals and interests of the Proponent clarified and to assist in the development of meeting products,
  - Reviewing written products, and
  - Providing a Sponsor / Proponent welcome during the plenary session
• Assists the Special Meeting Committee Chair, VP(MO), President-Elect, Special Meeting Chair, and the Planning Committee in the advancement of a Special Meeting from concept approval through the approval of the TOR and the Announcement and Call for Presentations (if applicable).

• Coordinates all security and logistics support with the host site, insures that support is provided during the meeting, coordinates Sponsor reviews, and provides other administrative support to the Special Meeting Chair, as needed.

• Provides the office, collaborating, and telecon capabilities for use for planning committee meetings

• The staff has specific responsibilities
  – The CEO is ultimately responsible for the administration of Symposia and Special Meetings. They are responsible for reconciling overall plans and operations with the bylaws.
  – With the CEO, the Director of Meetings has the responsibility for the actual administrative support of meetings. They coordinate the MORS Office Staff in support of meetings. They work with the planning committee on details of the program and the site coordinator on matters of logistics.
Sp Mtg Support Team: Publications Committee

- Responsible for reviewing, editing and approving at least two PHALANX articles (advertising & results).
- Responsible for approving the publication of special meeting written final reports or proceedings based on both content and style, but is not responsible for letter reports.
Sp Mtg Planning Team: Meeting Chair

- Directly responsible for planning and execution of the meeting and preparation of meeting products
- Responsible for participant selection, quality of presentations, conduct of the meeting, and preparation of products
- The Special Meeting Chair will:
  - In conjunction with the MORS Office, develop and follow a specific timeline
  - In conjunction with the Special Meeting Committee Chair, VP(MO), President-Elect, and the MORS Staff, develop the TOR and gain its approval from the Executive Council
- Depending on the Special Meeting and the chairs selected, either the Program Chair or the Technical Chair could lead the meeting.
Sp Mtg Planning Team: Chair Considerations

- Special Meeting Chair (MOM, Section 9.17):
  - Understands the Special Meeting Milestones, Planning Committee Meetings, and Meeting Products
  - Has reviewed the MORS Special Meeting tutorial
  - Has participated on a Special Meeting Planning Committee in a leadership role at least three times

- Special Meeting Co-Chair (MOM, Section 9.17):
  - Understands the Special Meeting Milestones, Planning Committee Meetings, and Meeting Products
  - Has reviewed the MORS Special Meeting tutorial
  - Has participated on a Special Meeting Planning Committee in a leadership role at least once

- Occasionally, a non-MORSian is selected to be the Special Meeting Chair because of a new topic for MORS or because MORS is trying to encourage more participants from that new area or group. If this is the case, the Special Meeting Co-Chair needs to be a MORSian that understands Special Meetings.
  - Consideration should be made to select this person to be the meeting Technical Chair instead of the overall Special Meeting Chair.
The Special Meeting Chair is in charge of Quality Control & Evaluation

- **Quality Control**
  - Has overall responsibility for the quality of the meeting and its products.
  - Must consider effective communications of the meeting results during the planning process.

- **Evaluation**
  - Will obtain evaluations from meeting participants and Sponsors / Proponents.
  - Will prepare an after-action report containing lessons learned and a summary of the evaluations.
Sp Mtg Planning Team: Technical Chair

- Not filled for every Special Meeting
- Recommended by the Executive Council and VP(MO)
- Primarily used when the Special Meeting Chair is an active MORSIAN familiar with MORS procedures, but not necessarily familiar with the subject of the special meeting
- Depending on the Special Meeting and the chairs selected, either the Special Meeting Chair or the Technical Chair could lead the meeting
Sp Mtg Planning Team: Working Groups

• Working Group Overview
  − Get the very best WG Chairs you can!
  − It is crucial to have co-chairs for each group
  − For more information, see “Types of Special Meetings” module, slides 12-22

• Working Group Membership
  − Chair: If only one person is leading the working group
  − Co-Chairs: If more than one are jointly leading the working group
    ▪ For example: Government and Industry Co-Chairs
  − Assistant Chairs: When you have co-chairs leading the working group and more people are involved in the working group leadership
  − Members: Those individuals that participate in the working group during the special meeting
Sp Mtg Planning Team: WG Considerations

- **WG Chair (MOM, Section 9.17):**
  - Understands the Special Meeting Milestones, Planning Committee Meetings, and Meeting Products
  - Has reviewed the MORS Special Meeting tutorial
  - Has participated on a Special Meeting Planning Committee at least once
  - Understands the Working Group Chair role

- **WG Co-Chair (MOM, Section 9.17):**
  - Has reviewed the MORS Special Meeting tutorial
  - Has participated in a Special Meeting or MORS Symposium at least once
  - Understands the Working Group Chair / Co-Chair role
• Having one has worked especially well for MORS workshops
• A panel of senior personnel to provide a broader overview across the meeting and helps working groups keep perspective
• They can be expected to identify and address some meeting-wide issues that otherwise would be ignored
• For more information, see “Types of Special Meetings” module, slide 23
• Synthesis & Integration
  – Leadership cross-talks and integration: WG Chairs & Synthesis Group
  – Attendee cross-talks and integration: WG Members & Synthesis Group
  – For more information, see “Types of Special Meetings” module, “slides 24-25
Sp Mtg Planning Team: SG Considerations

- **Synthesis Group Chair (MOM, Section 9.17):**
  - Understands the Special Meeting process & agenda, and the role of the Synthesis Group
  - Has reviewed the MORS Special Meeting tutorial
  - Has participated on a Special Meeting Planning Committee in a leadership role at least twice
  - Has participated on a Special Meeting Synthesis Group at least twice

- **Synthesis Group Member (MOM, Section 9.17):**
  - Understands the Special Meeting process & agenda, and the role of the Synthesis Group
  - Has reviewed the MORS Special Meeting tutorial
  - Has participated on a Special Meeting Planning Committee in a leadership role at least once
Assigning a Bulldog to every Special Meeting has proven useful to MORS
- Per MOM Section 9.21, the Bulldog is assigned by the Special Meetings Committee Chair as early as possible in the development of a special meeting
- The Bulldog works for the Special Meetings Committee Chair, not the Special Meeting Chair

What is a Bulldog?
- To provide assistance and oversight, external to the special meeting’s organizational structure to ensure that
  - The event contributes to the overall financial welfare of the Society
  - The products of the special meeting are delivered to the Sponsors within the timeframe agreed to in the Terms of Reference

Who is a good Bulldog? Someone who:
- Has chaired a MORS Special Meeting,
- Understands how MORS operates,
- Is aware of current special meeting issues, trends, and concerns, and
- Is willing to work and contribute.
• Why is one needed?
  – The importance of an appropriate number of well-run and well-attended special meetings each year has implications on the fiscal health of the Society, as well as fulfilling a contractual requirement to our Sponsors.
    ▪ The Bulldog is responsible for overseeing the Special Meeting Chair’s completion of all products defined in the TOR and the anticipated fiscal impact of the special meeting
  – Prior service in MORS leadership positions does not necessarily constitute an understanding of current concerns and issues regarding the conduct of special meetings.
    ▪ By teaming the Special Meeting Chair with a Bulldog, a reasonable attempt is made to ensure the success of the event from both content and product perspectives.
Activities include:

- Monitoring the organizing committee’s activities,
- Getting people jump-started,
- Reminding the Special Meeting Chair to keep them on track,
- Speaking up if planning gets off track,
- Tackling issues before they become problems,
- Helping to resolve delays when they occur,
- Helping to track when products are due, and
- Helping to ensure that products are delivered on schedule.
Sp Mtg Planning Team: MORS Bulldog IV

- Activities DO NOT include
  - Working for the Chair of a particular special meeting
    ▪ The Bulldog **will not** be assigned task associated with the planning and execution of the special meeting
  - Product delivery
    ▪ This is the responsibility of the Chair
    ▪ The Bulldog is responsible for keeping the Chair on track
  - Developing templates, finding volunteers, and assigning action items
    ▪ These are the Chair’s responsibilities, not the Bulldogs
There are numerous government and industry professional organizations, some of which may be interested and working on issues related to the topic of the workshop.

The Special Meeting Planning Committee can approach these organizations to see if they would like to be Industry Marketing Partners for the meeting:

As a minimum, Industry Marketing Partners will:
- Advertise the MORS Special Meeting to their membership, and
- Provide representatives to the planning committee and actual workshop.
Sp Mtg Team: Summary

• In this module, you learned about your team and their responsibilities:
  - The Support Team
    - Executive Council, VP(MO), President-Elect, Special Meeting Committee Chair, Proponent Sponsor, Publications Committee and the MORS Office
  - The Planning Committee
    - Special Meeting Chair, Technical Chair, Working Group Chairs / Co-Chairs / Assistant Chairs, Synthesis Group and the MORS Bulldog
  - Industry Marketing Partners

• In the next module, you will be introduced to the associated paperwork – both in preparing for the special meeting and the products that will be developed after the special meeting
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