Academy of Marketing Science World Marketing Congress

Request for Proposals

Introduction

Representatives of the Academy of Marketing Science will work jointly with a university/institution faculty and administration host team at a non-USA location to conduct the Annual Academy of Marketing Science World Marketing Congress (AMS WMC). We currently seek proposals from parties interested in hosting either the 24th or 25th AMS WMC in the respective years of 2023 and 2024. The following information and instructions are provided for those interested in submitting a formal proposal to host this conference.

The goals of the AMS international program leadership team are that the congress is to provide all in attendance with a meaningful professional and cultural experience characterized by engaging, empathetic, intellectual interaction and social conviviality. Financially, we hope to avoid a loss so as not to impose a burden on our host institutions nor ourselves. At the same time, we want the AMS WMC to be a memorable occasion that leaves the attendees with a favorable impression of the institution and AMS.

The exact number of registrants cannot be forecasted accurately. Hence the proposal should offer plans and revenue/expense summaries based on an attendance that would range from 150 to 500 registrants. The AMS contact can provide some help in guessing, based on their experience, what location would bring what size of attendance.

Though the exact dates for the congress have not been established, proposals should give preference to a date based on a July through late August 2023 window. Since school academic schedules vary, dates reaching back into late June may be proposed. The AMS Annual Conference is typically near the end of May. We do not want to present a conflict with the Annual Conference. The congress academic sessions typically run over a three-day period. This would be Wednesday through Friday. Cultural activities may be held at some point during these three days (usually on Thursday afternoon) or on Saturday after the professional program is completed. The following is a typical general congress schedule:

- Afternoon/evening registration occurs on Tuesday, the day before congress sessions begin. A welcome reception and perhaps a presentation from the local arrangement team or officials is often included.
- Day one (Wednesday) usually begins at 8:30 a.m. with academic sessions going until about 5 p.m (time can be adjusted to fit context and setting). The day typically concludes with a wine-tasting session for those interested or some other appropriate culturally based reception.
• Day two (Thursday) starts at 8:30 a.m. with academic sessions ending midday with a recognition luncheon to follow. The afternoon/evening is devoted to a culturally-related event(s). Often, this would involve a city tour, or it could involve more than one type of tour.

• Day three (Friday) starts at 8:30 a.m. with academic sessions through about 5 p.m. On Friday evening a reception and gala dinner are held.

• As noted earlier, all or part of Saturday may include some culturally-related events as an alternative to doing this on Thursday afternoon. Group based (optional) tours may also be organized as a nice way for delegates to get more acquainted with the area. If demand for paper and special sessions dictates, sessions may also be held on Thursday afternoon.

Number of Sessions: The number of simultaneous academic sessions varies with the size of the Congress. A small Congress may require 5 simultaneous session rooms. A large Congress may require up to 12. Thus, for planning purposes, a facility with a minimum of 8 competitive paper/special session rooms during each congress time slot (i.e. 8:30 – 10 a.m., 10:30 – noon, 1:30 – 3 p.m., and 3:30 – 5 p.m.) should be considered. The WMC works well when the sessions can be held in a school facility. However, the convenience of location plays a role in whether a school facility or hotel convention facility can be used, the latter typically being a more expensive alternative. Most paper sessions would have smaller attendances (maybe 20-30 for a large conference or 10-20 for a smaller conference), but some sessions (like Meet the Editors) can draw a larger crowd, so a larger room that could hold more (30-60 for a smaller conference and 60-90 for a larger conference) might be needed, but again this will depend on the size of the conference.

Events: The following is a summary of typical events, recognizing that each WMC will be unique to some extent:

1. Pre-conference day (Tuesday): evening reception (beer, wine, juices, soft drinks, water) at a hotel, restaurant, school, or community facility.
2. Day 1 (Wednesday):
   a. morning refreshment break (coffee, tea, soft drinks, water, juice)
   b. afternoon refreshment break (same as above)
   c. evening drinks-only reception (beer, wine, juices, soft drinks, water),
   d. lunch (only if sponsored, that is, not paid for with congress registration fee or required by location (on a campus where lunch on one’s own is impractical).
   e. A one-hour wine marketing/tasting session starting about 15 minutes after the final afternoon session or other such event for those interested.
3. Day 2 (Thursday):
   a. morning refreshment break (same as above),
   b. recognition luncheon,
   c. afternoon city tour or cultural event.
d. In some cases, afternoon sessions will be held based on cultural schedule and number of papers accepted.

4. Day 3 (Friday):
   a. morning refreshment break (as above),
   b. afternoon refreshment break (as above),
   c. lunch (if sponsored or impractical as discussed for Wednesday),
   d. early evening AMS President’s drinks-only reception (as above)
   e. WMC Gala.

All or part of Saturday may include some culturally-related events. This option would be a substitute for not having cultural events on Thursday afternoon. Some cultural events are not included in registration fees so those who wish to enjoy them must pre-pay and such payments are non-refundable.

Again, please note that lunches may be included depending on session site location and/or available sponsorships and costs. The recognition lunch is always provided.

Requirements/Encouragements:

1. Those who bid on the congress should seek sponsorship from their own institution, the business community or appropriate professional organizations or individuals; but such sponsorship is highly encouraged but not required to be included in the formal proposal. If support is included in the proposal budget, a minimum of $10,000 US should be included.

2. If a convention services company/associate is engaged by the institution to assist in coordinating AMS WMC activities, that expense should not be part of the joint AMS-Institution WMC budget. Thus, such expenses are borne by the institution.

3. Sponsors may be willing to support one or more lunches, some or all of the refreshment breaks, some or all of the receptions, audio-visual equipment costs, space rental costs (if charges are incurred), any congress remembrance (specialty) items or general congress financial support. The sponsoring institutions (universities/colleges/schools) may wish to provide a congress cash grant, though this is not a requirement for proposal acceptance. The share of the expenses that can be raised from outside sources will influence what can be provided to the attendees beyond the basics of the congress.

4. Even with minimal sponsorships, an excellent congress can generally be provided from the share of the registration fees allocated to the local arrangements team. Registration fees are set to cover the costs of the basics of the conference.
a. The institution’s local arrangements team should expect approximately $425 US per registered delegate to apply toward the costs of putting on the WMC. As the number of delegates grows, the fixed costs associated with hosting a WMC become less of a factor in the financial outcome. The idea is that the $425 would cover variable costs after considering fixed costs and sponsorships.

b. AMS will cover the costs of the electronic conference management system, proceedings, registration management, registration systems, a web-portal through www.ams-web.org, AMS home-office staffing, printed awards and plaques, ticket printing (if any required), badges (if standard AMS badges are used), badge holders (if standard AMS badge holders suffice), and staff/co-director air-travel outside of the joint institution-AMS WMC budget.

c. Complementary, convenient, hotel space should be sought for the co-directors of international programs and one AMS Congress Chairperson. Any additional complementary hotel space negotiated or otherwise earned in contractual obligations should be applied to the AMS WMC budget.

d. Any compensatory time applied by an institution to an individual faculty member for purposes of chairing/hosting/local arrangement chairing an AMS WMC should not be included in the AMS WMC budget by either the institution or AMS. In other words, no faculty or staff buy-outs are to be considered as part of the proposal nor be passed on to the AMS WMC. They are solely at the institution’s discretion.

e. The Academy of Marketing Science World Marketing Congress is carried out as a service to participants and the discipline, therefore, the objective is not to produce a great surplus of revenue over expenses. This should be kept in mind as costs for various activities are examined. Also fees to be charged participants should be reasonably comparable to recent congress experience. In the end, the institution and AMS agree to share equally any profit or loss based on the AMS-WMC budget.

f. Upon mutual agreement of the terms for conducting a WMC, and upon selection of a site by the AMS Executive Committee (EC), a signed statement of understanding reflecting an understanding and agreement with the requirements outlined here should be exchanged between the institution and AMS.

Considerations

Congress sessions should either be in a single hotel, a conference facility or on the campus of the university. The potential host team should determine
what the priority is among such options and present their thoughts on the matter to the (co) Director of International Programs.

If a single hotel is chosen as the congress venue people will be lodging there and at other locations nearby. If the congress venue is a convention center or the university, there will be a need to find multiple lodging options as “congress hotels.” In any case hotel rates must be reasonable and preferably should include breakfast and all taxes. There have been a few occasions in the past where student or other lodging options were also available at the university for those on a tight budget.

The Congress Local Arrangements Chairperson (CLAC) is typically a faculty or staff member from the host institution (colleges/universities may form a consortium). The CLAC should put together a team to organize and manage all of the functions of the congress except those that are scholarly-program related.

The host institution will also be responsible for providing sufficient staff and administrative support during the congress to aid the AMS Central Office team in managing the on-site registration. AMS will be providing at least one staff person who will be in charge of the registration process during the Congress.

The Local Arrangements Team will coordinate all local functions and oversee the proper execution of the day-to-day logistics (hotel, meals, breaks, presentation rooms, receptions, cultural activities, transportation, etc.) of the congress. The Co-Directors of International Programs will work closely with the host team throughout the congress to provide decision-making support and mentoring.

The Co-Directors of International Programs have overall responsibility for the congress. They shall recommend both Congress Program Chairperson(s) (CPC) and the CLAC to the AMS Executive Committee. The latter group must approve the appointments of the CPC (s) and the CLAC.

The Co-Directors of International Programs will work with the CPC (s) and the CLAC as necessary to facilitate the congress. Further, a site visit may be made by one or both of the Co-Directors of International Programs before final approval is given. The Co-Directors of International Programs will be available to aid in the negotiations of the contract with the congress hotel management staff should a hotel be used for the professional program and some events. The institution (potential) will cover all ground-related expenses associated with such a visit (hotel, ground-transportation, meals). Given that such site visits are often prospective, the airfare associated with a visit will be considered AMS WMC overhead and not charged against the particular AMS WMC budget. Similar, the expenses incurred by the institution shall not be charged against the AMS WMC budget.
The call for papers, the management of the review process and the assembly of the program and proceedings will be done under the direction of the CPC(s). An electronic conference management system will be used to facilitate the paper processing and review activities, to aid in organizing and publishing the printed program booklet and in the publishing of the proceedings.

All financial information presented in the proposal should be in both the currency of the host country and in USD using the current exchange rate on the date of the proposal. This exchange rate should be indicated in the proposal along with the currency designation (Pounds, Pesos, Kroner, Yen, Euros, PEN, etc.) The cost summary for all local arrangements should be in totals for various activities and on a per-person registered basis (200-500 persons). Ideally, a spreadsheet allowing entry of number of delegates that would automatically show “what-if” based on different number of delegates would be prepared for the Congress.

Note: when settling accounts at the end of the congress a method to accept payment in USD with minimal conversion/transfer charge must be arranged. If charges are in excess of 100 USD they will be deducted from any share of the surplus due the host institution. Invoices of all expenses must be provided to the Co-Directors of International Programs during the congress or immediately upon its completion. The currency exchange rate to be used for all invoice and payment calculations will be that value at 16:00 pm on the Wednesday of the congress. The CLAC must work closely with the Co-Directors of International Programs so that agreement on events and costs can be carried out and controlled. Wire fees will be considered part of the AMS WMC budget.

All pre-registrations will be paid in USD to the AMS Central Office. The person handling the pre-registration in the Central Office will provide up to date information for those managing the on-site registration. Payments on-site must be in USD and paid through either VISA, MasterCard or American Express. Cash in USD currency will also be accepted on site.

Those people who are not members of the Academy of Marketing Science are to pay a registration fee that includes a one-year membership in the AMS. These membership monies will be accounted for separately and are not considered part of the revenue stream of the congress.

All persons who attend the congress must pay the full registration fee or have their fee paid by a sponsor. This also includes all AMS officers and members of the program and local arrangements team. There will be no partial payment rates for attendance of less than the full congress.

Remember, individuals who are members of the local arrangements team need no previous conference local arrangements experience since the Co-
Directors of International Programs will be closely mentoring the team and helping them work through any and all problems and questions.

I. The Proposal Format

A. The written proposal format is:

1. Host Information: Information about the sponsoring university, the names of those people recommended as the Local Arrangements Chair(s) and local arrangements team members will be should be provided along with information about previous conference experience, if any, possessed by these individuals.

2. The Hotel: Information about hotel accommodations (quality, number of rooms, suites, etc.), ability to provide conference facilities (break out rooms, meal, reception and banquet facilities) with appropriate cost information, and room rates (single, double) including breakfast must be provided.

   How will the number of paid room-nights impact on hotel facilities charges (if applicable)? How will complimentary room nights (for key officers) be tied to conferee room nights paid? What is the ratio of paid room nights to complimentary room nights (e.g., 20 to one).

   If more than one hotel will be needed to accommodate participants, this also must be discussed in the proposal. How transportation from multiple hotel locations to session sites will be handled and costs should also be included.

   We will also need periodic reports from the hotel on reservation numbers. This is to include number of rooms, number of persons and number of reserved room-nights.

3. Hotel Sample Contract: A sample hotel contract should be provided (if required). The hotel staff must understand that a typical tour contract is not appropriate. Delegates will be making their own reservations and paying their room and other hotel expenses. The Academy of Marketing Science will not be responsible for such. Further any damages caused by individuals are to be settled with the hotel. AMS will not be responsible.

4. If university/college space is to be used for the professional program, breaks, lunches, the wine tasting, some receptions, transportation, etc., then information must be presented in sufficient detail to allow for an assessment of this venue option.
5. Travel: Information (including approximate costs) about travel to the site of the proposed conference from various worldwide locations (including North America) is to be included. If special rates from one or more airlines are to be offered, this should also be indicated.

6. Fund Raising and Sponsorship Potential: Information about the potential for fund raising (i.e. sponsorships) as discussed earlier should be presented.

7. Proposed Budgets: As described above.

8. Site Visit Invitation.

9. Congress Title: The proposal should indicate that the title of the conference is to be “20XX - Academy of Marketing Science XXst World Marketing Congress” hosted by XXXX University.”

10. Send one copy of the proposal and one set of any other support materials you wish to provide by express mail to each of the Co-Directors of International Programs. The due date will be established under separate cover.

II. Hotel Contracts

A. If your proposal is accepted in principle and hotel contracts are being put together such contracts must be reviewed by the President, the Executive Director, and the Co-Directors of International Programs of the Academy of Marketing Science in the early stages of the negotiation process.

B. Mutually agreed upon hotel contracts must be signed in a timely fashion before the congress begins. Such contracts will be signed by an authorized representative of AMS and the hotel management representative. The Co-Directors of International Programs will work with the Local Arrangements Chair on contract development and to facilitate negotiations.

III. Reporting Practices

A. The congress Local Arrangements Chair(s) shall provide the Co-Directors of International Programs of the Academy of Marketing Science regular status reports on a mutually agreeable schedule from the time these individuals are appointed up through the conference itself.

B. The Local Arrangements Chair(s) shall provide a written follow-up report to the Co-Directors of International Programs no less than one month after the conference concludes. This report will include a profit/loss statement applicable to the on-site activity.
IV. Fund Raising/Sponsorships

A. A list of potential sponsors and/or actual sponsors and forecast or actual commitments should be included in the proposal.

V. Proposal Format

A. Your proposal must be prepared following the outline presented in this Request for Proposals. This will allow the evaluator(s) to evaluate the proposal and point to areas where additional information or clarification is required.

B. Please direct all questions concerning proposal development to the Co-Directors of International Programs.

VII. Security and Health Concerns

Personal security and potential health risks for all congress attendees are of paramount importance. Travel and in-country risks will be part of the evaluative criteria for site selection.

VIII. Conference Administration

A. The Executive Committee of AMS may designate which of the Program Co-Chairs, should there be more than one, who will have the lead program responsibility for the congress. The Local Arrangements Chair will develop and manage all on-site activities. Chairs must be members of AMS.

B. The copyright for the Congress Proceedings will be held by the Academy of Marketing Science.

C. The AMS representatives for International Programs are:

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