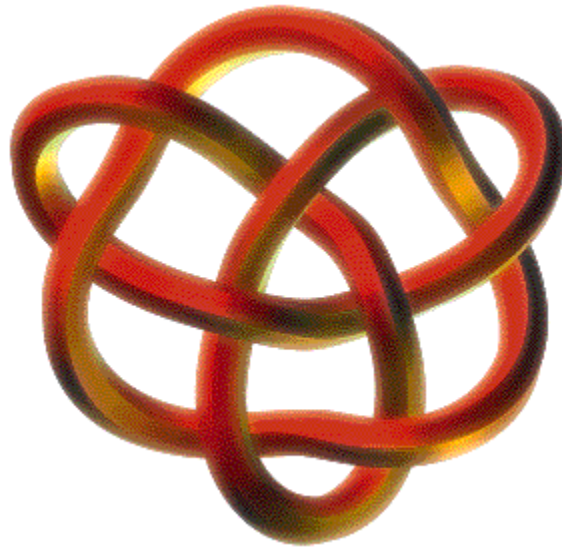

**The Canadian Undergraduate Mathematics Conference
(CUMC)**

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**La Conférence canadienne des étudiants de mathématiques
(CCEM)**



Operations Manual

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Questions or comments about this manual should be sent to chair-studc@cms.math.ca

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Introduction

What is CUMC?

The Canadian Undergraduate Mathematics Conference (CUMC) is a unique conference organised each year *by* math students *for* math students at different institutions across Canada. The CUMC is locally organised and is run under the supervision of the Canadian Mathematical Society Student Committee (Studc). The conference's principal organisers and participants are undergraduate students; however, anyone may participate and give a talk geared towards undergraduates.

The CUMC is an opportunity for students to explore mathematics outside their usual surroundings and spark their interest in areas they have not yet been exposed to. The conference also provides a unique chance for students to present what they find most fascinating and exciting, as well as to practise their expository skills in a friendly and noncompetitive environment. Indeed, the core of the gathering consists of a series of talks given by the participants. The CUMC is truly essential to the future of Canadian mathematics.

Foreword

This manual is the product of the efforts of more than a dozen members of past CUMC organising committees and of the Studc.

Each year, the CUMC is organised by a new team. The goal of this manual is ease the transition from one year's CUMC to the next. This manual is only a guide and, as such, it is up to the organisers to choose how to use it. No manual can take into consideration every circumstance; however, we hope that it will be helpful for future organisers.

After every successful CUMC, we ask organisers to work together with the Studc to keep this manual fresh and up to date.

CMS Student Committee (Studc)

The CUMC is organised primarily by the local organising committee. However, the local team works under the oversight of Studc. The CUMC president is an ex-officio member of the committee. Through Studc, the CMS provides CUMC with web hosting, registration setup and processing; the CMS also maintains control over the bank account, holds a contingency fund for the conference and updates this manual annually to maintain continuity. Studc is the best resources to answer questions or concerns when running the CUMC.

Guiding Principles

We request that each year's organisers protect the core principles of the CUMC: bilingualism, non-competitiveness and regional diversity.

The CUMC is a bilingual event. All of the documents (emails, posters, web-site) should have both English and French versions. Official speeches should be accessible in both languages as well. Finally, we recommend that at least one of the plenary speakers delivers their talk in French.

It is important to have an overall spirit of encouragement rather than competitiveness. Students should feel comfortable giving their very first talk at CUMC in a supportive environment. As such, there should be no prizes awarded for "Best Talk" or anything similar.

Being a Canada-wide event, CUMC must be accessible and advertised to students from across the country. Moreover, CUMC should be encouraged to travel between Canadian regions.

Planning

Organising Committee

At a glance:

- You need three to four key people;
- Recruit early;
- Ensure your committee is reliable;
- Recruit a webmaster and a translator (these need not be separate positions);
- Split-up responsibilities and define them *clearly*;
- Get help from outside the organising committee as needed.

Being president of the organising committee is not about being good in math; it is about leading. The president *might* be a scholar, but *must* be a manager who gets things done. The president is also an ex-officio member of the Studc.

Recruit your committee early. You should have at least two confirmed decision-makers upon placing the bid to host the subsequent CUMC. This enables you to start planning the conference nearly a year in advance, before the fall term commences. By the first weeks of the fall term, your committee should be confirmed. Keeping a stable organising committee is of the utmost importance. Ensure that everyone on the team is dependable. Organize this team very carefully.

Ideally, the committee should be composed of three to four key people with clearly identified roles. Having a sufficient number of dependable people is essential. You should maintain a balance of enough people to adequately delegate tasks and few enough that each person is responsible and

accountable. Too many people and you may even have trouble finding common meeting times with divergent schedules; too few people and this conference will become a burden.

There are certain positions that need to be defined. President is clearly one of them. However, you must also have a designated webmaster and a translator. These need not be completely separate positions (e.g., maybe the President is bilingual and can act as a translator), but they must be defined to ensure the smooth operation of the website and timely completion of the advertising material.

Outside Help

- Involve your Department: the Chair, professors and administrative staff have experience running conferences and will prove to be a great resource;
- CMS and Studc: as overseeing body, they are always there to help;
- Other university and local community resources;
- Volunteers: they are essential for completing smaller tasks during the conference, such as setting up and running the registration table, putting up signage, ensuring the food/drinks delivery for lunch and coffee breaks, moderating talks, etc.

Planning Timeline

The following is a sketch of the main organizational activities and recommended times for their completion.

At a glance:

- Set up your committee;
- Set conference dates;
- Establish a preliminary budget;
- Raise funds;
- Find guest speakers;
- Make reservations (lecture rooms, meals, AV equipment, banquet);
- Create your CUMC website;
- Advertise (emails, poster, get contacts from Studc);
- Solicit student talks;
- Build the conference packages.

August	<ul style="list-style-type: none"> ● Set up the organising committee ● Choose the dates for the conference ● Begin critical bookings: lecture rooms, meals, AV equipment
September	<ul style="list-style-type: none"> ● Set up a preliminary budget ● Prepare for fundraising: identify sponsors, prepare sponsor packages ● Identify potential guest speakers and begin contacting them
October	<ul style="list-style-type: none"> ● Start raising money ● Get information and prices about possible activities and banquet options
November	<ul style="list-style-type: none"> ● Follow up with potential sponsors ● Confirm guest speakers; assign them specific time slots
December	<ul style="list-style-type: none"> ● Update your budget according to confirmed funds ● Make your poster ● Start setting up the website ● Prepare a report to present to Studc at the CMS Winter Meeting
January/ February	<ul style="list-style-type: none"> ● Make final decisions regarding activities; confirm all the bookings ● Start advertising: get the necessary email addresses from Studc ● Email previous year's organisers and participants ● Print and mail the posters (include cover letter in each envelope): get departments' mailing addresses from Studc
March	<ul style="list-style-type: none"> ● Develop your conference packages ● Develop T-shirts design; find the producer for T-shirts ● Set up registration ● Recruit volunteers to help during the conference
April	<ul style="list-style-type: none"> ● Send email reminders about the conference ● Finalize your budget and adjust accordingly
May	<ul style="list-style-type: none"> ● Re-confirm all bookings, including banquet and room bookings ● Confirm with all volunteers
June/ July	<ul style="list-style-type: none"> ● Prepare a report to present to Studc at the CMS Summer Meeting ● Complete conference packages as of registration deadline; order extras to account for on-site registrants ● Schedule student talks ● Compile the program: schedule, abstracts, keynotes, local info, etc. ● Print programs 2-3 days before the conference: do it earlier and you will need to add something, do it later and something will go terribly wrong
CUMC	<ul style="list-style-type: none"> ● Have fun
August	<ul style="list-style-type: none"> ● Produce final report for sponsors; do not forget to thank them ● Produce final report for Studc

- | | |
|--|--|
| | <ul style="list-style-type: none">● Send suggestion/comments to Studc regarding this manual● Ensure a smooth transition to next year's organisers (emails of your participants, list of sponsors, etc.) |
|--|--|

Conference Scheduling

Conference Dates

The duration of a CUMC can vary between 3 and 5 days. Starting the conference on either Wednesday or Thursday is recommended since it is often hard for students to miss an entire week of work or school to attend. Typically, the CUMC starts before a weekend and runs through a final banquet, with perhaps a half-day on the final day to allow for travel.

Setting exact dates for the conference takes some thought. It is important to make your choice for the dates of the conference early. The conference should take place between mid-June to mid-July. Avoid long weekends, holidays, final exams, convocations and other conferences (you can usually find a list of events in the CMS Notes or on the CMS website, among other places).

Conference Schedule

Here is a sample conference schedule:

Wednesday afternoon: welcome address, possible keynote, opening banquet.

Thursday: morning and afternoon sessions, 2 keynotes.

Friday: morning and afternoon sessions, 2 keynotes.

Saturday: morning sessions, 1 keynote, afternoon activity, closing banquet.

Sunday: possible morning sessions, closing address.

Key points to keep in mind:

- Allow sufficient time for meals and coffee breaks. We suggest a 90-minute lunch and 30-minute coffee breaks in both the morning and afternoon sessions;
- An opening banquet or reception is important as it allows participants to meet and get to know each other at the very beginning of the conference.

Finances

At a glance:

- Get banking info from the Studc;
- Establish the registration fees;
- Set up registration with the CMS;
- Produce and keep an updated budget.

Bank Account

There is a permanent Royal Bank CUMC bank account, with cheques and a bank card, established for the conference and maintained by the CMS. By the end of summer, you should have all the account materials (cheques, deposit book, etc.). You can get it from the previous CUMC organisers or from CMS/Studc directly, but you must ask for it. To change signatories on the bank account, give those names to the Studc chair. The CMS accountant will then contact the bank and they will prepare a document that each new signatory brings to any RBC branch with ID. You will then have direct access to the account. Once you settle your finances after the conference, make sure you forward all the banking materials to the next year's organisers or to CMS/Studc.

If you decide to use your department to set up an account, you can do so. You will not get a debit card in that case and will need your department administrator to reconcile funds. Once you settle your finances after the conference, make sure you transfer all the remaining funds (if any) to the CUMC account for contingency purposes.

Registration Fee

A registration fee of \$80 is average. If it is less than \$70, it might not be enough to cover all your funding requirements. If it is above \$100, attendance might suffer. You can introduce early bird registration discounts. The general timeline is to close the registration 3 weeks before the conference. This allows the committee to plan expenses and orders for food and conference materials. The early bird registration closes about 6 weeks before the conference. This timeline might change according to your particular situation. Keep in mind that most participants will register within 1 to 2 months before the conference and there will be some late registrants.

The following is a table of registration fees for the most recent editions of the CUMC:

Year	Institution	Early-Bird Fee	Full Fee
2013	Université de Montréal	\$85.00 (available until June 1st) ¹	\$100.00 (available until June 23rd)
2012	UBC - Okanagan Campus	\$80.00 (available until April 15th)	\$95.00 (available until June 15th)

The CMS will set up the registration for you. Moreover, they will do it at no charge; however, you will have to pay credit card processing fees, which average 3% of the registration income. Contact the Studc chair to set it up.

While registration fees make up a large part of the conference's income, sponsorships are essential. Details about securing sponsorships can be found in the Fundraising section.

Tax Exemption

CMS is a federally registered charity (not-for-profit charitable corporation). Therefore, under the CMS umbrella, CUMC can claim a rebate of 85% of the total money raised to be HST/GST-exempt.

Expenses

Here is a list of the various expenses you should plan for:

- Lecture hall booking fees, if any;
- AV equipment booking fees, if any;
- Meals, coffee breaks, including tax and gratuity;
- Banquets, including booking fees, tax and gratuity;
- Activities, including booking fees, tax, gratuity and transportation costs;
- Keynote speakers: travel and accommodation costs, thank you gifts;
- Advertising: poster production, printing, postage and envelopes;
- Conference packages;
- T-shirts and/or other mementos;
- Travel support and/or registration exemption for some participants.

Budget

The budget is the most important document you will produce for the conference. You will have to adjust your budget as the preparations for the conference progress. It will most likely go through 3 stages: preliminary, after fundraising and final.

¹ For reference, a table of past conference dates can be found in [Appendix A](#).

A preliminary budget is essential for all the sponsorship requests. It includes the number of expected participants, itemized conference expenses and expected/confirmed funds, such as registration fees you expect to collect, Studc's contribution, and your department and university's support. You should estimate the expenses conservatively in case you do not get all the support you apply for as well as to cover unanticipated expenses. Look in Appendices E and F for a sample budget included in the sponsorship package.

Fundraising

Fundraising is one of the most important and also time-consuming tasks associated with organising the CUMC.

At a glance:

- Contact organizations that regularly/historically support the CUMC;
- Identify potential local sponsors - not necessarily academically-oriented;
- Compile the sponsorship package;
- Send sponsorship requests;
- Follow up;
- Ask for restricted funding if necessary.

Potential Sponsors

Fortunately, due to the already established reputation of the CUMC, there are numerous organizations that sponsor it regularly. Here is a partial list (ask the previous year's organisers for the list of their sponsors and the contributed amounts):

- Canadian Mathematical Society, through Studc - remember to explicitly request this amount from the Studc chair
- Statistical Society of Canada
- Regional Institutes:
 - Centre de Recherche Mathématiques (CRM), Québec
 - Institut des sciences mathématiques (ISM), Québec
 - Fields Institute for Research in Mathematical Sciences, Ontario
 - Pacific Institute for the Mathematical Sciences (PIMS), West Provinces
 - Atlantic Association for Research in the Mathematical Science (AARMS), Atlantic Region
- Canadian Applied and Industrial Mathematics Society (CAIMS)
- Canadian Society for History and Philosophy of Mathematics (CSHPM)
- Mprime Network, formerly known as MITACS (Mathematics of Information Technology and Complex System)
- Communications Security Establishment Canada (CSEC)

Other organization that have supported the CUMC in the past:

- Canadian Institute of Actuaries (CIA)
- Canadian Mathematics Education Study Group (CMESG), University of Western Ontario
- In Québec:
 - Association des Statisticiens et Statisticiennes du Québec
 - Le Fonds Québécois de la Recherche sur la Nature et les Technologies (FQRNT)
 - Groupe Interdisciplinaire de Recherche en Éthique Financière de l'Université du Québec à Montréal (GIREF)
 - Association Mathématique du Québec

Local resources:

- Your university (President, VP Academic, VP Research, etc.);
- Your department (Chair, professors - possible travel support for keynotes);
- Your faculty (Dean of Science);
- Other faculties and/or departments (Engineering, Computer Science);
- Your student union, association and/or math club (both undergraduate and graduate);
- Other university associations, such as student societies, alumni associations, etc.

Companies - these are more likely to donate products (if they have any) rather than money:

- Maplesoft;
- Research in Motion (Waterloo);
- AT&T;
- Local grocers (Save On Foods, Sobeys, Loblaws, Superstore, etc.);
- Publishers (McGraw Hill, Nelson, etc.);
- Esso (they contribute continually to educational causes).

Other:

- Government (municipality, provincial);
- Ministry of Education;
- Use your imagination - be creative!

Restricted Funds

In some cases, an organization may want to reimburse only specific expenses. These are called “restricted funds”, since approval for their spending is controlled by someone other than the conference organisers. Such funds most often come from regional organizations that are not local to the current CUMC (e.g. PIMS for the CUMC being held at Laval) and are normally restricted to be used for travel support of students coming from the respective region. If a certain regional organization is not willing to support the CUMC with unrestricted funds, in your follow-up you can suggest restricting their funds for a specific purpose. If they decide to do so, they may wish to handle that money internally.

Unrestricted funds include registration fees and all other funds given to you by external

organizations. You can allocate these funds in the budget any way you see fit.

Sponsorship Packages and Requests

Developing a professional-looking sponsorship package is essential to obtain successful sponsorships. The most basic package includes a cover letter and a tentative budget. You may wish to include more information about the conference, such as a tentative schedule and a description of your planned activities.

The cover letter must include the description of the CUMC, its vision and benefits for the community. It must also contain the information on advertisement or other benefits that the sponsoring organization will get (banner at the conference, logo on the poster and in conference packages, etc.). Include your contact information - a consistent email and web address is very important since it is a stable reference for sponsors. Finally, give the sponsors a firm deadline to reply by. Try to customize your letters to optimize your chances of success; for example, for recurring sponsors, mention how their support in the past contributed to the conference's success.

The budget is the most important document in the sponsorship package. A reasonable, clear and detailed budget gains confidence; a vague one makes the event organisers look unsure and unprofessional. Proofread your budget several times as mistakes and typos there can cause you to lose sponsors.

It will take time to find the right person to contact within each organization, so plan accordingly. Ask the previous year's organisers for these contacts, but keep in mind that they might not be current. Letters to tentative sponsors should be sent out in October. Follow up with your requests to ensure they have been received. Follow up if you don't hear back. Do not be discouraged by rejections and remember - the more organizations you ask, the more positive responses you are likely to get, so be resourceful.

See Appendices [C](#) and [D](#) for sample sponsorship requests.

Making Numbers Match

Once you have heard from all the sponsors, you need to re-adjust your budget accordingly. You must plan for unexpected expenses; we suggest leaving 5-10% of your entire budget to cover unanticipated costs (and there will always be some).

In the unfortunate event that your financing needs were not met, there is a small contingency fund which holds some reserves from previous conferences. Do not plan to use this money or to have a deficit in your budget: be responsible and think about the conference's future.

Speakers

At a glance:

- Schedule one keynote per half-day;
- Contact potential keynote speakers early; try to have at least one local professor speak;
- Budget keynotes' registration fees, flight, accommodations and gifts;
- Ask if keynotes can cover their own travel; ask within the department for visiting profs;
- Encourage bilingual talks;
- Solicit student talks;
- Offer 2 possible lengths for student talks;
- Recruit moderators; make sure they stick to the schedule.

Keynotes

Any large scientific conference needs plenary speakers. However, since this conference is geared towards students, keynotes should not be the focus of the CUMC - we recommend one speaker per half-day with one hour-long lecture each. Ensure that the room is large enough to hold all the participants. Do not schedule any other activities during keynotes.

When contacting potential guest speakers, ensure the speaker is genuinely interested and committed; if they keep delaying their reply, find someone else. Conversely, good candidates are research presenters who are widely regarded as strong speakers, particularly to undergraduates. Explain to the speakers the vision of the CUMC and the intended audience. Free conference registration, including banquet tickets, for the speakers is required. Let the speakers know before they book their flight tickets that they are invited to stay for the whole event - most are delighted at the opportunity. You can offer to cover the travel expenses and accommodations for the guest speakers. In that case, to help reduce costs try to get speakers from the local geographical area, including the nearby United States, and speak to your faculty about visiting professors that may be around at the time of the conference. However, if the professor has already expressed interest in presenting, in the follow up letter ask them if they could cover a portion (or all) of their travel expenses.

We strongly suggest that at least one of the plenary talks should be in French (more if the conference is held in Québec). The CUMC is a bilingual event and every effort should be made to accommodate the francophone community. Do not assume that because a professor is from a French speaking university that the talk will automatically be in French. To make the talk truly bilingual, suggest to the speaker to speak French, but have slides in English. This will also encourage the anglophone participants to attend.

In the past, there were incidents when the anglophone students left immediately after the French keynote started. This is very rude to everyone involved - the speaker, the organising committee, the francophones in the room and the community in general. It is not clear how this can be prevented: the best solutions so far have been to ask the speaker to make slides in English and to generally encourage the spirit of bilingualism throughout the conference.

It has become a tradition to offer a small gift to each speaker. Do not give cash. Presents can include a bottle of wine, a gift certificate, etc. Ensure that the gift certificates, if you get them, can be used in speakers' local area.

Student Talks

Student talks are the core of the CUMC. Any topic related to math is acceptable - the goal is for the speaker to get experience presenting something they are interested in. Encourage all students who register to give a talk - you can even provide extra travel support for participants giving a talk. Furthermore, make it clear that it is in the best interest of the student to give a talk as in that case they may receive travel funding from their department, student union or university.

Offer students two possible lengths for their talks, for example 20 minutes and 50 minutes. Experience indicates that 20 to 25 minutes is the ideal length for the short talks.

You will have to schedule parallel sessions. Plan that carefully. Try to ensure no talks will have really low attendance. Do not schedule talks on similar subjects at the same time; do not schedule talks by people from the same university at the same time - people want to go to see their friends talk.

Recruit volunteers to serve as moderators for the talks. Make sure your moderators introduce and thank the speakers and keep the talks on assigned schedule - they should not start talks early if they are ahead of schedule since many people will want to switch rooms. Allow sufficient time (usually 5 minutes) between talks as a cushion for people to change rooms and stretch their legs. It is also a good idea to have water and cups for all the speakers.

Reservations

There are various bookings you will need to make, but they all have one thing in common - you have to make them as early as possible.

At a glance:

- Book lecture rooms in August the year before and double-check the bookings regularly;
- Get lecture rooms close together; ensure they will have the necessary equipment in them;
- Set up wireless access for participants;
- Reserve a block of rooms in residences for the participants to book; negotiate a reduced rate; do not get involved in booking for participants;
- Make lunch and coffee breaks' arrangements;
- Reserve venues for banquets far in advance as summer weekends are a busy time;
- Ensure that there are vegetarian options at every meal you serve;
- Organize a memorable activity;
- If you serve alcohol, check if you need a liquor license to do so.

Lecture rooms and equipment

Booking rooms at a university is never straightforward. Some rooms can be booked directly from the department's secretary, but some might be the responsibility of another department, of the faculty, or of the university administration directly. Book far in advance, in August the year before. Once booked, confirm your reservation again several months before the conference, then several weeks and finally several days before the event - universities are known for losing or rescheduling the bookings last minute.

You need to book rooms for student talks (20-30 people capacity) and a room for keynotes (100+ people capacity). Avoid booking rooms whose capacities differs greatly from the audience's size - the speaker might feel uncomfortable presenting to a crowd if the room looks empty. Get the same set of rooms for the entire conference. Get rooms that are close together. Consider equipment that might be permanently in the room and book other equipment as necessary: you will need a computer or a laptop, a projector and an overhead in each lecture room. Ensure that the lecture rooms with chalkboards/whiteboards have plenty of chalk/markers. Ensure you have the phone number of the appropriate person to reach in case room's doors are locked or in case of equipment malfunction.

Participants should have access to a wireless network and possibly a computer room. Make sure to set up wireless account(s) for the CUMC participants.

Consider any other things you might need to borrow or rent (this will depend on your activities): a car, a van or a bus, a barbecue and a cooler, a camera, etc.

Make sure directions to the rooms and room numbers are clearly indicated: make your own signage. You may need to replace the signs throughout the conference if cleaning staff takes them down.

Accommodations

Do not to act as an intermediary between the participants and the residences, unless absolutely needed. Reserve a block of rooms, but let the students book their own rooms, providing them with all the information to do so (web-site address, group code, etc.). You do not want to deal with bills for property damage, long distance calls and other potential disasters.

To ensure availability, you need to reserve rooms as soon as possible, normally by the end of September. If it is impossible to book residences or if they are too expensive, consider a hotel near the university or, in some cities, another university's residences. Availability of accommodations is another factor to take into account when setting conference dates, so it must be done early on.

When booking, you will need to estimate the number of participants and can somewhat accurately do so by taking into account recent CUMCs and their locations. Before you book, check with residences the consequences of too few/too many bookings and estimate you numbers accordingly.

Ask for a reduced group rate. If possible, try to get rooms close to a common room so that participants can gather naturally. Find out what meals are included with the accommodations. Find out what is included with the rooms and what is not (such as towels/linens/etc.) and post this information on the website. Ask the residence to offer participants without roommates an option of pairing up with someone else in the same position to save on accommodation fees.

Meals

Breakfasts are optional. When booking residence accommodations for students, check to see if they serve breakfast.

Lunch is usually provided on all main conference days, which do not include the first day with the opening banquet and the day on which the closing banquet is held. Avoid fast food type meals. A barbecue or a buffet work well with a large group, but might not be possible.

We do not recommend that you provide evening meals beyond the two banquets as the participants will want to explore the city. Moreover, your budget will most likely not be able to accommodate those additional costs.

Incorporate short coffee breaks between conference blocks to allow people to stretch out, use the washroom and grab some refreshments. Catering is often easier, but more expensive, so decide between that or supplying your own snacks (do check your university's policy as in some places the outside food is not allowed). There should be tea and coffee (do not forget milk and sugar), water, juices and some light food options.

Special dietary needs and allergies are very important in planning of all the meals. On your registration form, include a place where participants can provide information about their special needs and make sure that your caterers/restaurants/banquet halls are well-informed about it.

Banquets

Reserve the venues for your banquets well in advance, as summer is a busy time. This is particularly important for the closing banquet, as it may take place on Saturday evening. If you hold a banquet at a hall or on campus, you might need to get an alcohol permit. Find out well in advance, since getting a permit takes time.

An opening banquet or a reception is important as it allows participants to meet and get to know each other before the conference starts. This is a more modest event than the closing banquet.

The closing banquet is a CUMC tradition. It is normally held on the Saturday evening (the evening before the final day) and is usually organised at an external location. In the past, we have seen banquets held on a cruise (CUMC 2001 and 2007), a boat tour (CUMC 2009) and at a culinary

school (CUMC 1997), just to name a few. Both a served meal and a buffet can work, but it must be a meal - finger foods are unacceptable. Consider giving the closing speech at this event, thanking all the sponsors and all the participants and announcing the location of the next year's CUMC.

Activities

Consider organising some activities. At past CUMCs, participants visited Old Montreal, went to Casino Niagara, did white-water tubing down Elora Gorge, saw bronco bucking at the Calgary Stampede, hiked in Banff, saw the whales in the ocean near St. John's, visited the nuclear reactor facilities of McMaster University, went to Canada's Wonderland, among other activities. Local attractions are always a popular choice for activities as they give unique flavour to your conference. Organised activities need not be paid for by the CUMC, but can just be led by the organisers for interested participants. However, be sure to let the participants know in advance if they will have to pay for the activity themselves.

Alcohol

Note that if you serve alcohol during any meal, banquet, reception or any other activity, you need to check with the venue regarding its regulations. In some cases, a permit is needed for serving alcohol on campus; in other cases, alcohol must be served and provided by the campus staff or food services. If you host a reception off campus, consider the various possibilities: paid bar versus drink tickets included with registration. Do not have an open bar - the bill will rise very quickly, among other issues.

Insurance

Insurance should be covered by the facts that you schedule conference to take place on campus and do not get personally involved with accommodation bookings or participants' travel arrangements.

Website

At a glance:

- Get the information on the website set up from the CMS;
- Set up an email address;
- Design your website;
- Set up the registration through the CMS.

The CMS provides two permanent web addresses for the CUMC website: cumc.math.ca for the English site, and ccem.math.ca for the French one. These websites, along with the CUMC electronic archives, are physically located on a hard drive belonging to the CUMC in the CMS office. Contact the Student Committee Chair to receive the password to access the account. Also, if you wish to use the CUMC email address, make sure it points to your local email address.

You should put your site online as soon as possible specifying the location and the dates. The website is used for both publicity and as a mean of conveying information for the participants. The look and feel of the webpage reflects the dynamics of the local organising team. On the front end of the website, include all the essential information - getting to the conference (by car, bus, train, plane), location of registration desk, your contact info. Also, since each organising committee works under the aegis of the Canadian Mathematical Society (CMS) through Studc, the CMS and Studc logos should both be featured prominently on the website header (or a comparably visible location), and not on the sponsor's page.

The registration will be done by the CMS, but make sure the form includes:

- Name, home university, email address.
- Home province (for travel subsidies and registration fee waivers).
- T-shirt size.
- Will you be giving a talk? If yes, then of what length? (Provide specific options). Include its title or abstract (this might be done at a later date, but have a firm deadline).
- Dietary restrictions.
- Will you be attending the opening and closing banquets?
- Request to include their name on the web-site list of participants. This permission is required by law.

Having the archives in place allows you to get ideas from past conferences. For example, to see the CUMC 2002 website, go to cumc.math.ca/2002. When the conference is over, your website will be placed in the archives for future visitors.

Advertisement

At a glance:

- Include all the relevant information of all the advertisement; include the logo;
- All advertisement must be bilingual;
- Design your own poster;
- Get departmental contact lists (both mailing and electronic) from Studc;
- Explore all possible publicity venues.

All the publicity and advertising should contain all the relevant information, such as the name of the conference, the logo, the location, the dates, website address, email contact and a list of any confirmed keynotes. All the publicity must be bilingual - be careful to ensure that both your English and your French grammar are correct.

It is important, for consistency and professionalism reasons that all the announcements are sent out from one fixed email address. You can set up an account either with your department or with any mailing server. Try to avoid using Gmail or Hotmail: institutional addresses look more professional, and are less likely to be sent to a junk folder.

Logo

The current CUMC logo was designed by Montreal CUMC 1997. This logo has been representing the CUMC ever since. The image of the CUMC is important and, as such, the logo should appear on all your website, the poster, all printed materials, etc. You can change the logo's color scheme, but do not change the logo itself. Any changes to the logo must be approved by the Studc.

Poster

The CUMC poster is a major form of advertising for the conference. It must contain all the relevant information and it must be bilingual - this can be achieved with one single bilingual poster or with two different ones. Check out previous CUMCs' websites for poster samples.

Ensure that you mail the posters early in the year, so that the potential participants are aware of the event. When mailing the poster, include a bilingual cover letter explaining the purpose of the poster and requesting that it be placed somewhere visible to students.

Contacts

Studc maintains a list of up-to-date mailing addresses of the math (and math-related) departments and a list of email addresses of the math student unions of universities, colleges and CEGEPs from all over Canada; get those lists from them.

Studc also maintains a list of departmental listservs, while CMS maintains the list of the department chairs. You cannot post to these lists yourself; you have to request Studc and CMS, respectively, to send the announcements out for you.

Other possible contacts include previous CUMC organisers and previous years' participants (contact corresponding organisers for their email contacts, but do not go more than 2 years back).

Other Publicity Venues

Here are some very important publicity venues:

- The CMS Winter Meeting. You should prepare the progress report to present to the Studc at the CMS Winter Meeting. Make sure you provide all the relevant information to the Studc chair before the meeting itself, so that they can announce it at the Board of Directors. If your poster is ready, mail several copies to the Studc to distribute to the members of the Board and post it around the conference venue.
- Notes from the Margin. The Studc has a bi-annual newsletter that is sent out both electronically and as a hard copy to students and departments all around Canada. Send an email to student-editor@cms.math.ca to put a note in the winter edition.
- The CMS and Studc websites. Department's website. Sponsors' websites (specifically institutes).

Conference Packages

The registration package should include, among other things, the following items:

- The conference booklet;
- Paper and pen;
- Name tag;
- Any necessary documents (registration receipt, travel reimbursement forms);
- T-shirt;
- Campus map;
- Map of the city and list of local attractions, including places to eat nearby the venue;
- Information Studc asks you to include;
- Information sponsors ask you to include;
- Banquet tickets and any other meal tickets if needed;
- Folder/bag to hold all of the above.

Several of the above things could be provided to you by your university or the city (in particular, pens and maps). Your local institute might want to provide folders, pens or other paraphernalia with their name and logo on them. The CUMC organisers usually try to be creative and include different mementos at every conference: a portfolio, a mug, a puzzle, a key chain, etc.

Conference booklet

The conference booklet is the most important part of the conference package. Like all your other documents, it should include your logo and it should be bilingual. It should include:

- Welcome from the organising committee;
- List and logos of all the sponsors;
- List of organisers and volunteers;
- Schedule of the conference;
- Keynotes' abstracts and possibly a short biographical information about each speaker;
- Student talks' abstracts with name of the speaker, their university, date and location of the talk;
- List of activities.

As an example, take a look at any CMS Meeting program or a previous CUMC program (you can generally find those on the web).

T-shirt

The CUMC T-shirt has become a tradition. It should bear the logo of the CUMC, the date (possibly just a year) and the location. It should also be bilingual. For the back of the T-shirt, be creative - for example, CUMC 1997 shirts had the pictures of famous mathematicians throughout the ages, CUMC 2009 had the mathemagician.

Picking a good quality T-shirt is worth some additional expense. When ordering the T-shirts, remember to order extras for late registrants. Consider also giving T-shirts to volunteers, keynotes, department chair, etc. In 2009, the organising team was given polo shirts both as gifts and to help distinguish them for the participants.

Other

Conference Bid

Stude is responsible for selecting the next conference organising committee. Details about the bid guidelines can be found in the CUMC section of the Stude website.

Transition

Congratulations! You succeeded in creating a Canada-wide event that will go down in history and be remembered by a crowd of students and several keynotes. You now need to ensure a smooth transition into the next year's CUMC.

At a glance:

- Compile a report to be sent to sponsors;
- Compile a report to be sent to Stude;
- Transfer banking information or transfer the remaining funds;
- Keep checking your conference's email regularly.

Compile a report summarizing your conference to be sent to your sponsors. This report should give sponsors a better idea of what their funds were used for so that they see the value in contributing to the conference, which can help ensure that they continue to sponsor the CUMC in the future.

Another, more detailed report must be submitted to Stude. This report will be used to both update this transition manual and will be passed on to next year's organisers to help them in planning their edition of the conference. This report should not only document how you ran the conference, but should also feature your own reflections on how everything went – that is, what worked well, what didn't (and why), as well as suggestions on how the conference could be improved (even if you did not get a chance to implement these ideas yourselves). These reports are essential in helping the conference grow and continue to be a success. To ensure a smooth transition, this report must be submitted to Stude **no later than five weeks after the conclusion of the conference**.

Upon completion of this report, you should also transfer any supporting documentation to the Stude so that they can make these documents available to the next organisers. Important supporting documentation includes draft and final budgets, sample sponsor packages, and sponsor contacts.

Contact the Studc chair(s) about the best way to transfer these documents.

If you used the CUMC account (as opposed to your department or another account), send the cheques, bank card and all the necessary information, such as a pin number, to the next year's organisers. Remind them to change the pin number for security purposes once the authorization is transferred.

If you did not use the CUMC account, transfer the remaining funds, if any, to that account. It can be done by simply writing a cheque.

If there is money left over (the amount is generally quite low), inform the sponsors by telling them that the remaining funds will be transferred into the CUMC contingency account.

Check your email regularly after the conference as the sponsors, Studc, and the next year's organisers might still need to contact you.

Appendix A: History

The first inaugural CUMC was held at McGill University in 1994. The CUMC was modelled after the Canadian Undergraduate Physics Conference, which a group of McGill mathematics students attended the previous year. In 1996, the Canadian Mathematical Society (CMS) took the initiative to make the CUMC an annual event and it has been running under CMS and Studc oversight ever since.

Chronology of CUMC since 1994

Year	Dates	Institution
2014	July 2-5	Carleton University
2013	July 10-14	Université de Montréal
2012	July 11-15	UBC Okanagan Campus
2011	June 15-19	Université Laval
2010	July 6-10	University of Waterloo
2009	July 8-11	Carleton University
2008	July 9-12	University of Toronto
2007	July 18-21	Simon Fraser University
2006	July 5-9	McGill University
2005	July 13-17	Queen's University
2004	June 16-20	Dalhousie University
2003	May 28-June 1	York University
2002	July 2-7	University of Calgary
2001	June 12-17	Université Laval
2000	June 6-10	McMaster University
1999	May 26-30	Memorial University
1998	July 9-12	University of British Columbia
1997	July 10-13	Université de Montréal
1996	July 18-21	University of Manitoba

1995	May 11-14	University of Waterloo
1994	May 12-14	McGill University

Appendix B: Sample Schedules, Laval 2011 and Carleton 2009

Sample Schedule I: Laval 2011, June 15-19

Wednesday, June 15th

14h00-16h30 Registration
16h30-17h00 Refreshment break
17h00-17h30 CMS presentation: How to give a good talk
17h30-18h30 Keynote speaker: Frédéric Gourdeau
19h00 Opening Banquet

Thursday, June 16th

9h00-11h00 Student talks block
11h00-11h30 Refreshment break
11h30-12h30 Keynote speaker: Pamela Gorkin
12h30-14h00 Lunch
14h00-16h00 Student talks block
16h00-16h30 Refreshment break
16h30-17h30 Keynote speaker: Aurélie Labbe
19h00 Women in Math panel discussion

Friday, June 18th

9h00-11h00 Student talks block
11h00-11h30 Refreshment break
11h30-12h30 Keynote speaker: Thomas Brüstle
12h30-14h00 Lunch
14h00-15h00 Student talks block
15h00-15h30 Refreshment break
15h30-16h30 Keynote speaker: Jean-Marie De Koninck

Saturday, June 18th

9h00-11h00 Student talks block
11h00-11h30 Refreshment break
11h30-12h30 Keynote speaker: Yves Demay
12h30-14h00 Lunch
14h00-16h00 Student talks block
16h00-16h30 Refreshment break
16h30-17h30 Keynote speaker: Yvan Saint-Aubin
17h30-18h15 CUMC 2012 presentation bids
19h00 Closing Banquet

Sunday, June 19th

9h00-11h00 Student talks block
11h00-11h30 Refreshment break and CUMC 2012 vote
11h30-12h30 Keynote speaker: Frederick Rickey
12h30 CUMC 2012 voting results

Sample Schedule II: Carleton 2009, July 8-11

Wednesday, July 8th

15:00-16:45 Registration
17:00-18:30 Opening Remarks and Keynote Speaker: Jit Bose (Carleton University)
19:00-22:00 Opening Banquet

Thursday, July 9th

8:00-9:00 Breakfast
9:00-11:00 Conference Block
11:00-11:15 Coffee Break
11:15-12:15 Keynote Speaker: Cynthia Bocci (Statistical Society of Canada)
12:15-13:00 Lunch
13:00-15:00 Conference Block
15:00-15:15 Coffee Break
15:15-16:15 Keynote Speaker: Ram Murty (Queens University)

Friday, July 10th

8:00-9:00 Breakfast
9:00-11:00 Conference Block
11:00-11:15 Coffee Break
11:15-12:15 Keynote Speaker: Colin Weir (University of Calgary)
12:15-13:00 Lunch
13:00-15:00 Conference Block
15:00-15:15 Coffee Break
15:15-16:15 Keynote Speaker: Robb Fry (Thompson Rivers)
18:00-21:00 Banquet Boat Trip

Saturday, July 11th

8:00-9:00 Breakfast
9:00-11:00 Conference Block
11:00-11:15 Coffee Break
11:15-12:15 Keynote Speaker: David Jao (University of Waterloo)

Appendix C: Sample Sponsor Request, SFU 2007

Conference Description

The CUMC is a unique conference hosted each year at a different Canadian university for students who are interested in all areas related to mathematics, including statistics, biomath, economics, applied math, finance, computer science, and physics. In 2006, the 13th CUMC became an international conference, welcoming students from abroad. The conference's principal organisers and participants are undergraduate students; however, anyone may participate and give talks geared towards undergraduates. In fact, there are always a number of lectures given by professional mathematicians.

The CUMC is an opportunity for students to explore mathematics outside their usual surroundings and hopefully spark their interest in areas they have not yet been exposed to. The conference also provides a unique chance for students to present what they find most fascinating and exciting, and to practice their expository skills in a friendly and noncompetitive environment. Indeed, the core of the gathering consists of a series of talks given by the participants. Those who have participated in the CUMC believe it to be essential to the future of Canadian mathematics.

Simon Fraser University in British Columbia will host the 14th annual CUMC from July 18 to 21, 2007.

Sponsor Request

Dear _____,

Simon Fraser University (SFU) is excited and proud to host the 14th annual Canadian Undergraduate Mathematics Conference (CUMC) from July 18th to 21st, 2007. The CUMC is an annual gathering of undergraduates from around the country. In 2007, we are expecting over 100 students from across Canada to come to SFU to share some of their research or to present lectures on subjects they have mastered. The conference is a great chance for future mathematicians to meet and build a network of friends from across the country. In addition, students will meet professors from various fields of mathematics who will present their current mathematical research.

The logistics of hosting such an event necessitate expenses of the order of \$25,000. These funds are needed to invite guest speakers, rent the conference venues, cater for the conference and organize activities around Greater Vancouver. Hosting a successful conference at SFU would be of significant benefit to the community. The event would bring together 100 of the brightest mathematics undergraduates and six guest speakers for four days at the SFU Burnaby Campus.

Registration fees for attendees help to cover some of our expenses, but this is an insufficient amount to cover our expenses. We are asking you to help us in our endeavor by assisting us financially to create a memorable event for future mathematicians. Please be assured that there will be proper

visibility of the _____'s logo on our official website, programs, and t-shirts.

We have enclosed a tentative budget, schedule of events and a description of the CUMC. Please feel free to contact us at our email address, cumc-finance@math.sfu.ca.

Thank you in advance for your interest in our conference. We look forward to hearing from you soon. In order to ensure proper visibility of _____, please respond by January 15, 2008.

Sincerely,
CUMC 2006

Appendix D: Sample Sponsor Request, Laval 2001

Dear Mr. _____,

It is with a lot of enthusiasm that we are announcing the 8th Canadian Undergraduate Mathematics Conference to be held at Université Laval in Quebec City from June 12th to June 17th, 2001.

This gathering of future mathematicians is an opportunity for our committee to welcome over a hundred of our fellow undergraduates in mathematics in the magnificent setting of Quebec City. They will be encouraged to share some research experience through talks ranging in duration from 20 to 50 minutes. Professors in various fields of mathematics will also be invited, thus allowing student participants to broaden their knowledge of current mathematical research.

However, for this event to be successful, money is needed to cover the fees of programs, invited speakers, food, and auditoriums. Registration fees help us pay for some of these expenses, but they are insufficient. This is why we ask for a sponsorship from your organization. An amount of \$ XXXX would greatly help us in making CUMC 2001 a great and memorable event for the hundred of young Canadians who will attend to it.

In order to ensure a proper visibility for your company, please give us a feedback before January 15th. Be assured that proper arrangements will then be made for the logo of your organization to appear in our official website, programs, and on the shirts the participants will bring back home.

A projected budget and a tentative schedule of this great event are enclosed.

Thanking you in advance for your cooperation, we are looking forward to hearing from you soon. Should you wish to, please do not hesitate to contact us.

Sincerely,

Pier-André Bouchard-St-Amant
Treasurer, CUMC 2001

Appendix E: Sample Preliminary and Sponsor Budgets, Laval 2010

Preliminary Budget

Revenue

Registration fees (175 attendees, \$90/person)	15750
Laval Department of Mathematics and Statistics	3000
AESMUL	2000
AESGUL and CADEUL	500
Statistical Society of Canada	500
MITACS	1000
Institut des sciences mathématiques	1000
CMS Studc	1000
Private Sponsors	6750
Total Revenue	31500

Expenses

Advertising	
• Posters (\$3/poster, 200)	600
• Postage (\$2/poster, 100)	200
• Graphic designer	700
Material for attendees	
• T-shirts (\$10/shirt, 175)	1750
• Conference kits (\$10/kit, 175)	1750
Opening banquet (\$20/person, 175)	3500
Meals	
• Lunches (\$10/person, 175 people, 3 times)	5250
• Coffee, snacks (\$4/person, 175 people, 8 times)	5600
Closing banquet	
• Dinner (\$40/person, 175)	7000
• Music	200
• Buses (\$200/bus, 4 buses)	800
Keynotes	
• Accommodations	1000
• Transport	1500
• Gifts	400
City tour	500
Shuttle service to the airport	250
Total Expenses	31000

Sponsor Request Budget

Revenue

Registration fees (160 attendees, \$78/person after tax)	12480
Laval Department of Mathematics and Statistics	2000
AESMUL	500
AESGUL	750
CADEUL	500
AELIES	300
ADSEG	500
Statistical Society of Canada	500
MITACS	1000
Institut des sciences mathématiques	1000
CMS Studc	1000
Vice-rectorship for research and creation and	1000
Vice-rectorship for studies and international activities	
Student services centre of Laval	500
Internal project support	1000
Centre de recherches mathématiques	1000
Canadian Applied and Industrial Mathematics Society	1000
Analysis Research Chair (by Thomas Ransford)	1000
FQRNT	750
Ministère de l'Éducation, du Loisir et du Sport du Québec	500
Conseil du Trésor du Québec	500
EXFO	750
Fields	1000
GIREF	1000
Association Mathématique du Québec	300
Université Laval Foundation	500
Zone Université Laval	350
Service de placement de l'Université Laval	300
Total Revenue	32730

Expenses

Advertising	
● Flyers	15
● Graphic designer	210
● Cost of online registration	450
● Registration reduction for Laval students (\$50*30)	1500
● Registration reduction for volunteers (\$90*7)	630
Material for attendees	
● T-shirts (\$15/shirt, 175)	2625
● Conference kits (\$11/kit, 170)	1870

● Studc newsletter	45
● Name tags	60
Opening banquet (\$26/person, 150)	3900
Meals	
● Lunches (\$8.5/person, 170 people, 3 times)	4335
● Coffee breaks (\$485/break, 8 times)	3880
Closing banquet	
● Dinner (\$33/person, 170)	5610
● Room reservation	170
● Music	250
● Alcohol license	80
● Juice, soft drinks, wine	475
● Tablecloths and decorations	250
Keynotes	
● Accommodations (\$125*9)	1125
● Transport (1 person)	3600
● Food	220
● Gifts (\$35*8)	280
Organising committee	
● Accommodations (\$50*4)	200
● Food	145
● Dinner for volunteers (12 people)	325
● Gas and parking	170
Total Expenses	32420

Appendix F: Sample Final Budget, Calgary 2002

Revenue

Department of Mathematics	5000
Faculty of Science	2000
Pacific Institute for the Mathematical Sciences	1000
Communication Security Establishment	1000
Canadian Mathematical Society	1000
Participant Payments	13,511.35

Total Revenue **23,511.35**

Expenses

Speakers

- Travel Expenses (Dr. Frigaard) 436.46
- Gifts 644.95

Food

- Lunches (3) 3076.50
- Dinner (1) 1371.00
- Dining Rooms (4) 200.00

Conference Kit

- Pens 139.30
- T-shirts 933.37
- Binders 1229.06
- Note Pads 42.59
- Programs 364.92

Banff Trip

- Bus 1705.00
- Park Entrance 177.00
- Dinner 1714.08

Advertising

- Posters 724.00
- Postage and envelopes 109.82

Miscellaneous

- Odds & Ends (Petty Cash) 131.78
- Snacks and coffee 183.03
- Food Reimbursement (J. Aiken) 42.85
- Gift 44.46

President's Expenses

- Banff Trip (Initial) 46.34
- Food 50.00
- Housing 296.74

• Parking	30.00
Travel Reimbursement	
• 21 students with \$100-\$400 support	3100.00
Total Expenses (Excluding University Residence Expense)	16793.27