The Optical Society

Policies and Procedures

OSA TOPICAL MEETINGS

Revised: November 2011

Introduction

Thank you for accepting the responsibility for chairing a meeting managed by the Optical Society (OSA).

The Chair's Manual has been prepared by OSA Staff to outline roles and responsibilities as we work together to produce a successful meeting. There are many tasks that must be performed on a timely basis to ensure the quality of your meeting. We hope this guide will facilitate your efforts.

In 2006, the Board of Directors of the Optical Society (OSA) tasked the Science and Engineering Council (SEC) to develop a process for the topical meeting portfolio that would allow rapid initiation of new meetings and would also allow the portfolio to financially break even. In response, the SEC developed the OSA Optics and Photonics Congresses (OPCs).

OPCs are clusters of collocated topical meetings spaced throughout each year. Each topical meeting will maintain its individual identity and is marketed separately to the research community, and has the option for special events pending sponsorships. Special events are also available as a purchase option. The degree of interaction with the other topical meetings is fairly open, ranging from sharing in a joint registration, reception and exhibit space, to having a joint plenary session and joint technical sessions.

Since multiple meetings will be joining together in one venue, coordination among the topical meetings and clear roles and responsibilities for all parties involved is essential. The Optics and Photonics Congresses will be aimed at creating a balance of topical cohesion and timing of industry-specific events.

In 2008, the Board of Directors approved the reorganization of the SEC into a Meetings Council (MC) and a Board of Meetings (BoM). While the Meetings Council is responsible for developing and monitoring broad OSA policy for meetings, the Board of Meetings is responsible for generating a balanced portfolio of OSA meetings and maintaining their overall quality.

Initial Proposal

Strong member involvement is a significant ingredient in OSA's successful topical meeting enterprise. Any member of the Society may propose a topical meeting. Proposals are due at least nine months prior to a new meeting or two years prior to a recurring meeting.   Meeting proposals should be submitted on a "Cosponsored Meeting Questionnaire" and include the following:

1. The scope of the meeting, including the research and engineering/ application content

2. List of topics to be covered

    To encourage programs in emerging areas, and better serve the engineering members of the society, topical meeting organizers should strengthen the applications-oriented aspects of their meetings.

3. List of program committee members (At least one third of the members must be new to provide a variety of views, while one third to two thirds of the Program Committee should be retained for any following meeting to provide continuity. No person is to serve on the Program Committee for more than four consecutive years.)

4. List of other societies (if any) that you would like to cooperate with the meeting

5. Proposed Congress and/or list of meetings with synergistic topics

6. A wide range of dates when you would like to meet (please pay special attention to dates to avoid due to competing or similar meeting dates)

    The final decision regarding scheduling the meeting, hotel and site location, and possible collocated meetings will be the decision of the Board of Meetings.

7. If a recurring meeting, the result of the topical meeting assessment tool needs to be included. If the meeting's score increased or decreased, the reason for this change needs to be addressed. Meetings with recurring poor assessments will be sunset by the Board of Meetings.

Any meeting requesting an exemption from being placed in a Congress must submit a request to the Board of Meetings with the meeting proposal.

EXCEPTION CRITERIA

With the launch of the OSA Optics and Photonics Congresses, the OSA Board of Directors approved the motion that, by default, all topical meetings would be placed in a Congress. Topical meetings wishing not to be part of a Congress must request an exception from the Board of Meetings. The Meetings Council has developed the following criteria when reviewing requests for exception:

1. Pre-existing agreements:

   a) Meeting is co-sponsored or co-managed with other societies (must be financial arrangement)

   b) Previous flexible management agreement with no financial liability to OSA

   c) OSA topical meeting that is scheduled to be collocated with other Society meetings (must have been pre-approved by the Board of Meetings)

2. New joint ventures with other Societies

Meeting organizers may also request an exception if substantial financial support for a specific location is obtained. Formal requests for exceptions must be requested 18 months prior to the requested date of the meeting and must include written financial guarantees from relevant institutions confirming the amount of financial support. This amount must be at least equal to the amount required for a break-even budget based on past meeting performance.

Meet the Players

The success of a meeting depends on the work and cooperation of many different people. Each individual topical meeting has General and/or Program Chairs, committee members, and OSA support staff. Each topical meeting also nominates a person to serve on the Congress Organizing Committee. Everyone associated with the meeting or Congress plays an integral role in the success of a meeting. Understanding your role and responsibilities is critical to the success of the meeting.

Many members, like yourself, volunteer their time and expertise to assist in the technical side of the meeting. The following will identify key people and significant duties.

A. OPC Organizing Committee
Each Optics and Photonics Congress will have an Organizing Committee to facilitate coordination between the individual topical meetings within the Congress. The organizing committee will consist of **one (1)** representative from each topical meeting within the Congress, and **one (1)** representative appointed by the Board of Meetings (BoM). In the event that there is a major disagreement among members of the OPC Organizing Committee, it is the responsibility of the BoM representative to bring the matter before the BoM for resolution. Likewise, any member of the OPC that feels he or she is not being fairly considered may choose to approach the BoM at any time.

In July 2009, the Board of Meetings stated that if a meeting within a Congress received fewer than 30 submissions, that meeting would forego its representation and voting status on the OPC Organizing Committee.

In September 2011, the Board of Meetings stated that any meeting within a Congress with 200+ attendees will be granted two votes on the OPC Organizing Committee.

If the appointed representative for a topical meeting is unable to participate in a conference call or email exchange where a decision is being considered, he or she may appoint a proxy. However, at no point will more than **one (1)** person per meeting participate in these discussions. The Organizing Committee will be asked for direction and resolution on items such as, but not limited to, the following:

- Date and location of the Congress (The BoM reserves the right of final approval)

- Approval of major deadlines or requests to modify these deadlines

- Developing a plan on how to handle submissions more appropriate for another meeting within the Congress (transfer of papers)

- Level of interaction between meetings in the Congress – i.e., joint sessions

- Slot allocation for the Congress, to include the following:

  a) Date and time of reception
  b) Allocation of slots (oral and poster) to specific meetings
  c) Number and timing of poster sessions
  d) Date and time of business meetings

- Whether to move forward on joint marketing material, if one or more topical meetings have incomplete information

B. General Chairs

General Chairs are responsible for all aspects of the conduct of the meeting, including the topics, publicity, press relations, exhibits and grants. Duties include, but are not limited to, the following:

- Submitting a meeting proposal form to ask that OSA manage the meeting

- Suggesting location and date

- Attending the Session Builder Training conference call

- Selecting the OSA Foundation Grant Winner

- Soliciting funds from granting agencies and corporations for travel support for selected participants

- Providing suggested audiences, exhibiting companies, and an overview of the current state of the topic area

- Determining with the Program Chair who should serve on the committee

- Identifying fundraising and sponsorship prospects

Some Topical Meetings will have one person who functions as the combined General/Program Chair.

C. Program Chairs

Program Chairs are responsible for the development of the technical program. Duties include, but are not limited to, the following:

- Selecting and confirming invited speakers

- Determining with the General Chair who should serve on the committee

- Providing complete contact information of committee members and invited speakers to OSA staff (Program Manager)

- Preparing the technical scope and topics for the Call for Papers in collaboration with the General Chair(s)

- Establishing rules for paper selection before the Session Builder conference call

- Reviewing submitted papers

- Attending the Session Builder Training conference call

- Determining the number of oral and poster sessions

- Scheduling conference sessions to avoid conflicts in programming

- Reviewing and determining acceptance for postdeadline papers

- Allocating travel funds

- Suggesting potential audiences, exhibitors and sponsors

D. Program Committee Members

Duties include, but are not limited to, the following:

- Promote the meeting, solicit and encourage contributed papers

- Suggest candidates for invited papers

- Support and adhere to meeting deadlines

- Review and score submissions to help determine which submissions should be accepted for presentation

- Attend the meeting and participate at on-site meetings, such as the Wrap-Up Meeting

In June 2009, the Meetings Council established a guideline recommending program committees be comprised in the order of 15 members from diverse institutions or higher to increase exposure for the meeting

OSA STAFF

Every meeting has specific goals and needs that must be met. The highly trained and competent OSA staff will support and enhance these goals using knowledge, experience and unique skills gained through many years of effective meeting planning. The key players are:

Meetings and Exhibits Department

A. Program Manager
The Program Manager is the primary contact to the Conference Chairs, Program Chairs and committee, and assists the Committee Members with the review and sessioning of the papers. The Program Manager works hand-in-hand with the Program Coordinator to manage all aspects of the papers and meeting publications, from confirming all the speakers to production and printing of the conference program and technical digest CD-ROM. Other responsibilities include:

- Provides guidance and assistance as needed to committee on all tasks and ensures program planning remains on schedule

- Oversees the receipt, tracking and dissemination of all technical papers submitted to the meeting, including postdeadline (if applicable)

- Works with the Meeting Manager to ensure the technical and poster sessions work within the contracted space

- Administration of regular and postdeadline peer review

- Notification of all authors

- Preparation of the online program, Technical Digest on CD-ROM, and Postdeadline Papers Digest (if applicable)

B. Meeting Manager
The Meeting Manager is responsible for the attendee experience at the meeting.   The Meeting Manager also works with the exhibit logistics coordinator and the sales manager on tabletop exhibits, sponsorships and logistics. Other responsibilities include:

- Location and site analysis

- Contract negotiations

- Budget preparation and monitoring

- Preparation of meeting specifications

- On-site management of meeting: primary contact for hotel and other facilities

- Facilitating extensive coordination with Marketing, Customer Service and Publications

- Completion of the Topical Meeting Assessment Tool

- Completion of End of Event surveys

C. Exhibit Operations Manager
The exhibit operations staff within the OSA Conventions and Meetings Department manages all exhibit logistics, including layout of the floor plan and on-site logistics.

Marketing and Sales Department

D. Marketing Manager
- Develops and implements promotional emails and printed materials for the meeting

- Tracks results of marketing campaigns

E. Exhibit/Sponsorship Sales Manager
- Works with input from Chairs and Program Manager to develop final list of available sponsorships, their benefits and prices for meeting

- Contacts prospective exhibitors and sponsors for the meeting, with input from chairs on best prospects corresponding to topics covered

- Ensures all sponsorship agreements are contracted in writing in approved OSA agreement format

- Responds to incoming inquiries about exhibiting or sponsoring at a meeting

F. Sales Administration Manager/Assistant
- Provides sponsors with shipping instructions and deadlines for artwork

- Collects contracted sponsor logos (for signage, reg. bags, etc…)

Calendar of Deadlines

Each Topical Meeting will have a Calendar of Deadlines. The Program Manager develops and distributes the Calendar and solicits feedback from the Meeting Manager, marketing department, and General Chairs. Once the Calendar is final, it is distributed to all committee members. It serves as the backbone of the Meeting, and the deadline dates are important. Each Topical Meeting will have a Calendar based on the following timetable.

Deadline (approximate months out)	Action [Key: GC=General Chair; PC= Program Chair; PCM=Program Committee Members]	Responsibility
10 mos.	Conference call with Program Committee	OSA, PC, PCM
9 ½ mos.	Revised scope and topics due to OSA from chairs	PC
9 ½ mos	Chairs to provide confirmed list of Program Committee Members to Program Manager	PC
9 ½ mos	Invited Speakers confirmed by Program Chairs by this date and spreadsheet forwarded to OSA	PC
9 ½ mos	Grant information to OSA from General Chair	GC
9 mos.	Program Layout to Chairs for Approval	OSA
8 mos	Call for papers online	OSA
5 mos.	Submission deadline (electronic submissions only) – No papers accepted after this date.	Authors
5 mos.	Committee notified papers are available for review and scoring online	OSA
4 ½ -4 mos.	Committee reviews and scores papers	PCM
4 ½ mos.	Program Chairs and OSA review and finalize slots based on earlier model by this date	PC
4 mos.	Scores due from Committee	PCM
4 mos.	Score reports to Committee from OSA	OSA
3 ½ mos.	Online Session Builder training	OSA,PC
3 ½ mos	Sessioning due; program finalized and into print production	OSA
3 mos.	Chairs' welcome letters due to Program Manager	GC
3 mos.	Author notification letters sent	OSA
2 mos.	Conference program online	OSA
2 mos.	Chairs distribute grants/recipients notified	PC/OSA
5 wks.	Housing deadline	Attendee
1 mo.	Pre-registration deadline	Attendee
1 mo.	Postdeadline paper submission deadline	Authors
3 wks.	Postdeadline paper review	PC
2 wks.	Chairs finish sessioning postdeadline papers/authors notified	PC/OSA
Meeting Date	Meeting	All
1 mo. after	Grant reimbursement forms due to OSA	Grant recipients
2 mos. after	Final report sent to Program Committee Members	OSA

Budgets

The Meeting Manager will prepare a detailed budget, listing registration and exhibit income, and various expenses including facilities, audiovisual equipment, promotion, food and beverage, publication production, mailing and travel costs. Any meetings that are unable to break even and/or any special requests for additional services will be submitted for approval to the Board of Meetings (BoM).

REGISTRATION FEES

Meeting budgets are based on all technical attendees paying a registration fee. Registration fees are set to cover projected meeting costs based on projected attendance.

> *Since Topical Meetings must break even, we are unable to waive registration fees.   Do **NOT** promise travel support or waive registration fees without initially consulting the Program Manager.*

Support is restricted to speakers who are disjoint to the conference leadership. Funds should not be used to support committee members or co-authors. See "Criteria for Requesting and Awarding Speaker Fees" (addendum A). Decisions made by meeting chairs with BoM oversight.

Many factors impact registration fees. For example: location; projected attendance; exhibit income; cost of food and beverage; audiovisual equipment; special events; and the production, printing and mailing costs of marketing materials and meeting publications. The Meeting Manager is continually working to identify ways to minimize expenses and aggressively negotiates favorable contracts with hotels, facilities and suppliers to arrive at the best cost, while still delivering a meeting of the highest quality.

For each attendee, the registration fee will include:

- Daily participation in scheduled activities

- (2) Coffee breaks for each full day

- (1) Conference reception

- (1) Printed Conference Program

- (1) Technical Digest on CD-ROM

Registration fees will substantially increase if charges are incurred for special events.

The only special event that is included in the basic registration package is a joint reception. Additional special events open to all Congress participants can be added, pending space availability and financial support. If the OPC organizing committee approves any additional special events to be open to all participants, staff will work with the facility to determine any additional costs, and the base registration fee for all may be modified.

Special events that are intended for only a specific topical meeting must be sold as a ticketed event, unless the organizers of that topical meeting are able to find a corporate sponsor.

Exhibits, Grants & Corporate Contributions

A. Exhibits

Having an exhibit at a topical meeting can help directly underwrite actual expenses. Additional sponsored events and/or items may also be sold. Exhibit and sponsorship fees are determined by OSA based on expenses and value of benefits offered to sponsors.

Exhibits are a major attraction for attendees at conferences. They enhance the meeting by providing attendees an opportunity to view the latest products and services in their areas of research as well as help defray meeting costs with booth fees.

Companies may purchase exhibit space at any OSA-managed topical meeting. Contact the Exhibit/Sponsorship Sales Manager for tabletop exhibit costs, as it changes periodically.

OSA requests that the Chair(s) and Program Committee Members provide a list of potential exhibiting companies and if possible, a contact person at each company. The Exhibit/Sponsorship Sales Manager will send exhibit space contracts and meeting information to past exhibitors and past attendees from potential companies. After contracting in writing for exhibit space, the exhibitor will receive logistical information about the meeting.

During meeting registration, Exhibits Only Badges are issued at no charge to exhibitor personnel. OSA will also issue each exhibitor one technical pass and one complimentary invitation to the conference reception. Additional passes may be purchased at the Registration Desk. For customers invited by Exhibitors to view their exhibits, OSA will issue Exhibits Only Badges that cannot be used to gain entrance to the technical sessions.

To increase exhibitor traffic, coffee breaks and poster sessions will be strategically placed in the exhibit area to increase interaction between the attendee and the exhibitor. Technical sessions will also be placed near the exhibits.

B. Government Grants

The OSA Program Manager will send a letter to the Chair(s) with instructions on obtaining funds. Due to the requirements of granting agencies, solicitation of grants must be made the summer of the year before the meeting occurs.

Late proposals cannot be processed. Grants can and should be solicited to defray the expense of invited speaker registration and travel costs. Funds can also be solicited to satisfy requests for travel support and waived registration fees for students and other participants. As funds are becoming more and more difficult to obtain, it is necessary for Chair(s) to find more sources to provide support.

Grants will be allocated as follows: 75% for travel and registration support and 25% to other direct costs of the meeting already budgeted. However 100% of National Science Foundation (NSF) funds will be used for travel and registration support.

1. The General Chair(s) must contact the granting officers from agencies who might be interested. If the granting officer is interested, discuss and confirm the amount that should be requested in the proposal (hopefully $10,000 or more).

   • NSF funds can only be used to support students and junior faculty from educational institutions. On occasion, NSF has agreed to provide support to other individuals, such as scientists from struggling economies, but this must be discussed very carefully with the granting officer.

   • Department of Defense funds cannot be used to support federal government employees or people from former communist countries unless approved in advance by the granting officer.

2. Once the amount is confirmed, provide the Program Manager with the granting officer's name, address, phone number, email address, the amount agreed on, and any other pertinent information.

3. NSF has tightened up its proposal submittal process. In addition to the above information, provide your curriculum vitae (two pages maximum) and a project summary. This should state the specific reason for the funds, who the recipients will be and why it is important they receive the funds. Stress the educational merits of the meeting and anything new and different about this meeting that sets it apart from other meetings requesting support. Please note this should not be a reiteration of the scope of the meeting, as it would have already been incorporated into the proposal. Even if NSF is not approached, this information will definitely strengthen any proposal.

4. Forward the information requested above by the due date specified by the OSA Program Manager. This date is usually in July. A grant proposal will be prepared based on the information provided, supplemented with data from various promotional pieces.

One major advantage in obtaining government grants is that the amount given ($5,000 - $15,000) is usually larger than corporate contributions.

C. Corporate Sponsorships

Corporate Sponsorships are funds used to support specific events or items before, during or after the meeting. These funds are given with the expectation that the sponsor will receive promotional benefits, such as signage with their company logo, in return. Examples include coffee breaks, receptions, exclusive signage, registration tote-bags, or advertising.

Corporate **sponsorships** are not the same as corporate **contributions**. All corporate funds that are promised to the meeting for specific events or items are considered sponsorships and require a sponsorship agreement detailing specific "sponsor benefits." Please see below description of Corporate Contributions.

> *Corporate sponsorships are negotiated and processed through the OSA sales department. If a company wishes to become a corporate sponsor, please forward their contact information and their specific sponsorship interests to the Exhibit/Sponsorship Sales Manager.*

D. Corporate Contributions

Corporate contributions can be solicited to defray the expense of invited speaker travel or overall meeting expenses. Contributions designated for a specific purpose will have 90% allocated to that purpose with the remaining 10% allocated to other related meeting costs. All corporate contributions must be guaranteed by the contributor in writing prior to budgeting the expenditure. Money received from grants and contributions cannot be carried over to future meetings.

Please note that corporate contributions are not interchangeable with tabletop exhibits. If a company wishes to exhibit and contribute, the initial dollars will go toward the full cost of the tabletop exhibit and the remaining amount will be the contribution. In the past, some corporate contributors have asked to display their literature in the registration area, session rooms, etc. To alleviate any complicated tax issues and to distinguish a corporate contribution from a sponsorship with specific sponsor promotional benefits, please **do not** agree to any tangible benefits as a result of a corporate contribution.

For Corporate Contributions, you should:

1. Contact any company that may have an interest in providing support.

2. Upon receiving a positive response, forward the complete contact information, the amount agreed upon and what action is required to the OSA Program Manager. Advise whether OSA is to send a letter of request or an invoice to the contact.

   If an invoice is needed, please have the company send to OSA/Attn: Corporate Grants a letter on company letterhead with the following information:

   - Dollar amount of the contribution

   - Purpose of the contribution

   - Date check will be mailed to OSA

   - Full name, title, address and telephone number of the empowered person making the contribution, indicating their authority to make the pledge.

3. Upon receipt of the contribution, we will send an acknowledgment.

There are several advantages in obtaining corporate contributions compared to grants:

- Much quicker and easier to receive the funds

- Do not require as much paperwork

- Funds are usually available in time for the meeting, since corporations want the written, verbal and online recognition

- Funds are usually unrestricted

E. Appropriate Usage of Speaker Fees
1. Funds should not be used to support members of a meeting's Program Committee.

   - Committee members are expected to attend their particular meeting using their own funds; available funding should be distributed in a way that does not cause any apparent conflict of interest.

   - Priority is given to invited speakers and other participants who would not normally attend a meeting, especially those whose attendance would lend credence to a new meeting or broaden the scope of an existing one, which would result in the participation of a new audience or interdisciplinary exchange.

2. The use of travel grants should follow the existing OSA Travel Guidelines, including consideration of ticket fare and class.

Marketing the Meeting

Since topical meetings must be successful based on the criteria of the Topical Meeting Assessment tool, effective marketing to increase meeting attendance and exhibit participation is crucial. The meeting can be marketed in many ways:

A. Website Promotion

OSA's website, *www.osa.org*, is committed to marketing meetings as a cost effective tool that reaches a broad base of people. The meeting website will be established once the meeting is approved and the dates and site are confirmed. The meeting site is continually updated by the Meeting Manager and Program Manager and will include links to the online submission site, the website of the city where the meeting will take place, the online registration platform, and the link to the Online Program Planner.

Each topical meeting will have its own homepage with complete program details for that specific meeting. Many of the logistical details will be replicated among the other meetings, but this approach ensures that the meeting is contained in one place with complete information for future reference. The consolidated (not unique) agenda of sessions will be listed in each topical meeting website.

It is also expected that the Congresses will have a landing page highlighting the many advantages to our corporate members with a list of topics (meetings) that they can expect to hear about at the Congress.

B. Broadcast emails

<u>Save the Date</u>
The first conference announcement will list the date, location and abstract deadline of the meeting as well as a brief description of the subject matter to be presented. This piece may be modified slightly to target various audiences utilizing different promotional tools to encourage meeting participation. This piece will have the widest distribution via emailing and availability at other topical meetings.

Call for Papers promotion

Each topical meeting will be promoted separately to a very targeted list to encourage submissions for the specific topical meeting. The Call for Papers includes a request for papers, list of confirmed invited speakers, and relevant meeting details. A reference will be included in the email highlighting the Congress the meeting is in. The email distribution will be supported by a promotional mailer to encourage people to contribute papers and use the web site.

Registration and Housing

Registration and housing will be encouraged for the entire Congress highlighting the benefits of attending multiple meetings for one low price.

C. Print Materials / Direct Mail

One-half and one-quarter page ads run periodically in Optics & Photonics News. Let the Program Manager know of other publications where these ads may be placed.

Meeting Postcards developed by OSA staff will be distributed to a large number of people and will be made available at other meetings.

Call for Papers promotion

One direct mail piece will be created for each Congress. However, each topical meeting will have a separate color coded section highlighting its scope and topics. The specific topical meeting sections will also be converted to PDF files that will be sent to the committee for posting in their respective university bulletin boards.

Registration and Housing

Registration and housing will be encouraged for the entire Congress highlighting the benefits of attending multiple meetings for one low price.

HOW YOU CAN HELP

To enhance the marketing of the meeting, the Marketing Department asks for your participation in the following ways:

- Personalize an email that OSA will send on the Chair's behalf soliciting submissions. OSA will provide a form letter for you to customize, including samples of what other meeting chairs have written. You and your committee can also use this letter to personally write colleagues to ask for submissions.

- The Chairs may be interviewed to help craft a descriptive paragraph about the meeting, highlighting featured program content and hot topics.

- Let us know if you or anyone on your committee will be attending a meeting and can pass out flyers. OSA will provide you with a flyer or a bookmark to distribute.

- Let Marketing know about any competitive meetings or publications that this audience might read, so that Marketing could negotiate a trade with them for advertising or mail lists.

- Let Marketing know about universities that might be strong in this area so that we market to this group.

- Discuss any additional ideas with the Program Manager.

D. Advertising / Mailing Lists

WHICH INTEREST GROUPS SHOULD BE TARGETED?

History is your best guide in determining which interest groups to target. Review of previous meeting results (if new, similar meetings) and discussions with previous Chairs and the Program Manager can reveal what mailing lists were the most successful.

OSA's membership is divided into Technical Groups that relate to a member's field of interest. These interest groups are maintained in a database and can be used to notify members and exhibiting companies of upcoming meetings.

	Optical Interaction Science		Fabrication, Design and Instrumentation
OF	Fundamental Laser Sciences	FF	Fiber Modeling and Fabrication
ON	Nanophotonics	FH	Holography and Diffractive Optics
OL	Nonlinear Optics	FL	Lasers in Manufacturing
OA	Optical Attoscience	FG	Lithography
OT	Optical Cooling and Trapping	FM	Optical Fabrication and Testing
OM	Optical Material Studies	FD	Optical System Design and Characterization
OP	Photonic Metamaterials: from Random to Periodic	FP	Polarization
OC	Quantum Computing and Communication	FT	Thin Films
OQ	Quantum Optical Science and Technology	FX	X-Ray and Extreme UV Optics
OH	Short Wavelength Sources and		

	High Field Physics		
OU	Ultrafast Optical Phenomena		
	Photonics and Opto-Electronics		**Bio-Medical Optics**
PF	Fiber Optics Technology	BM	Microscopy and Optical Coherence Tomography
PI	Integrated Optics	BP	Molecular Probes and Nanobio-optics
PL	Laser Systems	BB	Optical Biosensors
PC	Optical Communications	BT	Optical Trapping and Manipulation in Molecular and Cellular Biology
PO	Optoelectronics	BA	Therapeutic Laser Applications
PD	Photonic Detection	BS	Tissue Imaging and Spectroscopy
PS	Solar Energy and Light Harvesting		
	Vision and Color		**Information Acquisition, Processing and Display**
VA	Applications of Visual Science	IS	Applied Spectroscopy
VS	Clinical Vision Sciences	IT	Display Technology
VC	Color	IE	Environmental Sensing
VV	Vision	IR	Image Sensing and Pattern Recognition
		ID	Optics in Digital Systems

OSA will also contact other societies and purchase member and technical lists if cost effective. Other sources could include past attendees and authors of papers from previous meetings.

The groups identified now will be used by the Meeting Manager to generate mailing labels and broadcast emails for the preliminary meeting announcement. OSA encourages the use of the broadest applicable lists for email distribution.

Publications

To serve the needs of attendees and others in the optics and photonics community, the Optical Society offers several options for submission and publication of meeting content such as abstracts, summaries, viewgraphs, and full articles.

STANDARD PUBLICATIONS

A. Conference Program

The conference program provides a program schedule with abstracts of each paper to be presented. It is distributed at the meeting.

There will be one conference program for each Congress. The program will contain a consolidated agenda of sessions, where concurrent sessions associated with specific topical meetings will be clearly identified.

The abstract section will be divided by individual topical meeting and therein printed in session order. Abstracts for joint sessions will be duplicated and appear in each respective topical meeting section.

B. Technical Digest

The technical digest contains the summaries of papers presented at the conference. It is distributed at the meeting in CD-ROM format to technical registrants.

Each Congress will have one technical digest CD-ROM containing the summaries for all the topical meetings included in the Congress. Part of the CD-ROM functionality includes the ability to easily search papers for a specific topical meeting

C. Postdeadline Paper Program

The postdeadline paper program includes abstracts and summaries of accepted postdeadline papers submitted online prior to the meeting. It is distributed on-site at the meeting to registrants.

D. Optics InfoBase

Papers for all presentations given at the meeting are archived in OSA's Optics InfoBase for searchability among other OSA publications.

OSA policy is to withdraw all papers where authors do not show up to present. These papers are not included in the archived proceedings of the meeting.

ADDITIONAL PUBLICATION OPTIONS

E. Journal Feature Issue

To arrange for a feature issue in an OSA journal, the one of the committee members must contact the Editor-in-Chief. Special issues are regularly published in Applied Optics, Journal of the Optical Society of America A or Journal of the Optical Society of America B. Please approach the editor of the journal whose scope includes the materials presented at the conference. Participation in the special issue by meeting attendees is voluntary, and all submissions are subject to the regular rigorous level of journal peer review. Contact the OSA Feature Issue Manager (jricha@osa.org) for complete details about the feature issue approval process and publication procedures. There is typically a four month period between the submission deadline for a feature issue and the publication of the completed special issue, though all OSA journals publish articles online as they are ready, so many feature papers will appear much more quickly than that. Upon publication, feature issues for all OSA journals will be available online and in print.

F. *Express* Focus Issue

Optics Express, Biomedical Optics Express, and *Optical Materials Express*, OSA's all electronic, open access journals, offer a unique opportunity to publish meeting articles in a special focus issue. One of the committee members must contact the Editor in Chief to confirm the topic, designate a coordinator and review the publication process. Unlike feature issues, focus issues are published on a more specific topic and authors are invited by the coordinator to submit manuscripts; there is no broad announcement for submissions. Manuscripts undergo OSA's standard two-person peer-review. With a 6-8 week time-to-publication period, the issue could be scheduled to appear in conjunction with, or shortly after, the meeting.

Planning the Meeting

The length of each paper presentation will be decided, the number of slots and the overall program schedule will also be developed. There are several kinds of presentations. Some meetings include time for discussion after each talk with facilitators to lead discussions. Other meetings have an un-facilitated discussion period after each talk. This decision is up to the Chair(s) and additional ideas can be discussed with the Program Manager. Suggestions and comments by everyone will strengthen the program. However, the Chair(s) will make the final decisions on sessioning and program layout.

Though generally not part of a single topical meeting program, the OPC Organizing Committee is encouraged to add the following programs as joint programs for the entire OPC in a synergistic technical area:

A. Plenary Session

The plenary session can serve as a significant kickoff to the Congress. Speakers are generally given 40-45 minutes with no Q&A session, and should be selected by the OPC Organizing Committee on a topic of interest to all the topical meeting attendees.

Once the Chair(s) has obtained a commitment of participation in writing (email is acceptable), he or she should request a working title of the presentation. The Program Manager should be copied on any initial correspondence. Once the request for a working title has been made, the Program Coordinator will send a formal letter of confirmation, and will request the final title, high resolution photo, 35-word abstract and 200-word biography.

B. Short Courses

Short Courses are instructed by experts in the field and are designed to familiarize the student with a new rapidly advancing topic in optics and photonics as a refresher course for the basics. The Co-Chairs will select the instructors. Short Courses have a separate fee and are generally offered prior to the technical program and exhibit on Sunday. Short course materials are not available for purchase.

<u>Short Course Stipend Policy</u>

<u>Half-day courses (lecture)</u>

- Pro-rated stipend at $125 per attendee for full-paying registrants

- Pro-rated stipend at $25 per attendees for student registrants

- The pro-rated rates are in effect until the total reaches $1,000. Once the stipend reaches $1,000 this flat rate goes into effect.

- If the stipend is expected to be pro-rated, it would be mailed after the meeting is audited.

<u>Full-day courses (lecture)</u>

- Pro-rated stipend at $125 per attendee

- The pro-rated rate is in effect until the total reaches $1,500. Once the stipend reaches $1500, this flat rate goes into effect.

- If the stipend is expected to be pro-rated, it would be mailed after the meeting is audited.

C. Panel Sessions

Panel sessions provide interactive discussions focused on topics of interest to the industry. Panel discussions are comprised of industry panelists and should represent a broad range of viewpoints and technology.

TECHNICAL PROGRAM

The Technical Program Committee plays an important role in planning the meeting. They assist the Chair(s) by providing ideas on topics, areas of interest and invited speakers.

The Technical Program consists of a blend of invited, contributed and postdeadline papers. Short courses may be included, as appropriate.

D. Invited Papers

In most cases, invited papers which represent important original research are selected by the Technical Program Committee prior to the Call for Papers. Having a preliminary list of invited speakers included in the Call for Papers marketing piece and on the meeting website is a great way to enhance interest in the meeting.

> *To avoid any conflicts of interest, Program Committee members should generally be discouraged from presenting an invited paper.*

There are circumstances in which this is acceptable, subject to the judgment of the conference technical program committee. Committee member in question should be recused for the discussion. Significant deviations will be reviewed by the BoM.

The selection process of invited speakers must begin as early as possible to prevent delays in the production of the Call for Papers. It is advisable to review a list of previous speakers to avoid repetition. Once the invited speakers have been determined, their participation needs to be confirmed by the Technical Program Committee. A list of confirmed invited speakers is then forwarded to the Program Manager who will send a confirmation letter to the speaker. This letter confirms speaker participation and provides paper submission guidelines.

> *A waived registration and travel funds for invited speakers cannot be guaranteed. This funding should be raised through corporate contributions and grants.*

E. Contributed Papers

Contributed papers should be timely, original and previously unpublished contributions of high technical quality. At the time of submission, authors must designate a category (if applicable) and request a method of presentation from among the two set of choices selected by the committee:

A. Traditional choices:

- To be scheduled only for oral presentation, poster presentation unacceptable (Oral Only)

- To be scheduled only for poster presentation, oral presentation unacceptable (Poster Only)

- Oral presentation preferred, but poster presentation is acceptable (Oral preferred)

- Poster presentation preferred, but oral presentation is acceptable (Poster Preferred)

B. Optional choices:

- Oral presentation preferred

- Poster presentation preferred

- No preference

If the author's choice cannot be accommodated, the Chair must obtain the author's approval of any change. In cases where no preference is stated, scheduling shall be at the option of the Technical Program Committee.

> *Exceptional papers may be upgraded to the Invited status at the recommendation of the Technical Program Committee.*

F. Postdeadline Papers

Postdeadline papers are similar to contributed papers and give participants the opportunity to hear new and significant material in rapidly advancing areas. They permit the presentation of important work received after the contributed papers have been selected by the Program Committee. The standards for the timeliness and technical quality of postdeadline papers should be considerably higher than those for regular contributed papers, and the reasons for their late submission should be clear.

Paper Processing

The technical processing of each paper begins immediately upon receipt. Through the assigning of a unique number, the tracking of each paper and author is quite efficient. The corresponding author receives a notification when his/her paper has been scheduled (or rejected).

Prior to Online Sessioning via Session Builder, committee members will be asked to score the papers within their category or meeting on the review site. Committee members must submit their scores by the deadline in order to be included in the overall calculation used for sessioning the papers.

> *If ever there was time to adhere to deadlines, it is now. Chair(s) should stress this to Committee Members. Scores received after the deadline will not be included in the summary.*

Online Sessioning

With the advances in technology, all accept/reject and sessioning decisions are made electronically via Session Builder. One (1) chair per meeting will be given access to Session Builder and will session the program based on the decisions made by the entire committee. Special requests for live committee meetings to discuss and decide on the papers will be considered, pending available resources (i.e. meeting budget, staff time).

Prior to sessioning the papers online via Session Builder, the Technical Program Committee will discuss which papers to accept or reject based on scores and other technical factors. This discussion can be accomplished via email or conference call set up and led by the Program Chair(s).

After program details have been finalized, appropriate notifications will be sent to invited speakers and corresponding authors.

Conference Program

After the online sessioning has been completed, the Program is prepared, including the following information:

- Welcome Letter from Chairs

- Program Committee List

- Agenda of sessions

- Special Events, including short courses

- Abstracts

- Key to Authors and Presiders – alphabetical listing of authors, presiders and presentation numbers

Much of the above was previously gathered and published in the Call for Papers. The focus now is on the schedule of events, technical sessions and abstracts to be presented during the meeting. Delays in producing the Program will occur if the online sessioning is not completed in a timely manner by the chairs.

> *The Chair(s) or a committee member will be responsible for contacting invited speakers who have not submitted their paper at this time.*

The program will be available online 9-10 weeks before the meeting

Meeting Wrap-Up

A. On-site Planning Meeting

Planning for your next meeting is very important as it accomplishes several things:

- Review and evaluation of the Topical Meeting while it is fresh on everyone's minds

- Selection of Program Chair(s) for the next meeting

- Planning the future meeting

B. Meeting Assessment

After the meeting, the meeting manager will process the attendee surveys and complete the assessment tool. Regardless of the perceived health of the meeting, the assessment tool clearly indicates the components in which a meeting could improve.

In addition to maintaining the already strong areas, volunteers and OSA will work to develop these other areas for the next meeting. Meetings that have difficulty meeting the defined criteria will have a three-time offering grace period to implement improvements that would result in a better evaluation. Reviewing the Assessment Tool criteria prior to the planning of the meeting, both volunteer organizers and OSA should be able to work together to create a healthy Topical Meeting Program on all fronts.

Once again, ***thank you*** for chairing this Topical Meeting.