



**The Canadian Association of Physicians**

**L'Association canadienne des physiciens et  
physiciennes**

# **CAP CONGRESS HOSTING KIT**

*Updated by CAC, led by S. Page, 10 September 2010*

# CONTENTS

Preamble: .....	3
About the CAP Congress: .....	3
Benefits to the Host Institution:.....	4
Preparing a Congress Bid: .....	4
Financial Considerations and Budget: .....	4
Documentation and Milestones: .....	5
Committees and Advisory Structures .....	5
Program Committee:.....	5
Congress Advisory Committee and National Fund Raising Committee:.....	6
Local Organizing Committee: .....	6
Responsibilities of the Local Organizing Committee: .....	6
Detailed descriptions of Congress elements:.....	9
Bilingualism.....	9
Website .....	9
Herzberg Public Lecture and Reception:.....	9
Congress Banquet and reception: .....	10
Registration Area: .....	11
Sunday Symposia:.....	11
Plenary sessions:.....	11
Parallel sessions:.....	11
Exhibit area:.....	11
Poster session: .....	12
High School Teachers' Workshop (or Teachers' Day): .....	12
Executive, Council, and Ancillary Meetings:.....	13
The CAP Annual General Meeting: .....	13
Divisional business meetings:.....	14
Heads & Chairs Meeting:.....	14
Student reception:.....	14
Student competitions: .....	14
Science Policy Session:.....	15
CEWIP session:.....	15
NSERC New Faculty workshop: .....	15
E-mail/internet access: .....	15
Special Congresses .....	15

## APPENDICES

- A – *Summary of 30 most recent CAP Congresses*
- B – *CAP's Policy on Recognition and Reward of Congress Hosting Department*
- C – *Sample Letter of Invitation and Bid*
- D – *CAP's Sample Congress Budget (based on 600 participants)*
- E – *CAP's Policy on Congress Revenue Return*
- F – *Memorandum of Understanding*
- G – *Congress Service Agreement*
- H – *Milestone Schedule for Congress Planning*
- I – *CAP's most recent National Sponsor and Exhibitor Contact List*
- J – *CAP's Guidelines for Recognizing LOC Faculty and Student Volunteers*
- K – *CAP's Guidelines for the Successful Promotion of the Herzberg Public Lecture*

## Preamble:

This kit has been prepared as a guide to university departments which may be contemplating a bid to host a future CAP Congress. It contains a summary of the key Congress elements, introduces the roles and responsibilities of the CAP and the host university in Congress planning and facilitation, and describes how the various groups work together in an established committee structure towards a successful outcome. Current CAP policies and Congress-related documents, including a sample budget template, are provided as appendices.

## About the CAP Congress:

The CAP Congress is the most important general physics conference in Canada. It is typically held in the second week of June each year. On this occasion, hundreds of physicists from Canada and abroad meet at the host university to:

- communicate the results of their recent research
- learn about recent developments across the broad spectrum of physics sub-disciplines
- exchange ideas about teaching and recent developments in physics education
- celebrate and honour the achievements of CAP medal and prize winners
- be informed of recent developments in science policy and science funding in Canada
- conduct the business of the association via the Annual General Meeting, Divisional meetings, and meetings of CAP Council and Executive
- network with colleagues in the discipline from Canada and abroad.

The CAP congress has been organized annually since 1946. It has been hosted by roughly 30 different institutions. Attendance typically ranges between 300 and 650 delegates, depending on location and other factors<sup>1</sup>. It has, from time to time, attracted between 800 and 1000 delegates. On occasion, the CAP Congress has been co-located or jointly organized with sister organizations including the Canadian Astronomical Society, the Canadian Organization of Medical Physicists, the American Physical Society, the Mexican Physical Society, and Photonics North. Some Congresses have had special themes, such as the World Year of Physics (2005).

The CAP tries, as much as possible, to maintain a rotation schedule of holding its annual congress in locations that flow from Central to East to Central to West. This schedule recognizes that the bulk of the potential host institutions are located in the Central (ON/QC) region and ensures that there is not too great a burden placed on those regions with fewer institutions by requiring them to host the congress more often than others might. The CAP is willing to consider deviating from this schedule to accommodate special congresses as noted above, or to enable an institution that has never before hosted the congress to do so during a period where they feel it is possible to do so.

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<sup>1</sup> A summary of the most recent 30 CAP Congresses is included as Appendix A. The History of all CAP congresses held since 1946 (locations and attendance) can be found on the CAP's website at <http://www.cap.ca/en/activities/cap-congress/past-congresses/locations-and-attendance>

## Benefits to the Host Institution:

As it evolves, the importance of the CAP Congress to Canadian physicists continues to grow. Hosting a Congress, with its associated publicity, give a department the opportunity to showcase the accomplishments of its faculty, postdoctoral fellows, and students, as well as its programs and facilities, to a wide audience. This in turn raises the profile of the university, the department, and its programs on a national scale. At the regional scale, outreach and public events such as the Herzberg Memorial Public Lecture and the High School Teachers' Workshop play an important role. Hosting a CAP Congress can also have a direct benefit for the institution through its conference, food, and hospitality services. At the department level, the CAP's *Policy on Recognition and Reward of Congress Hosting Departments*<sup>2</sup> provides for an optional honorarium tied to local fund raising activities, which may be used to support initiatives promoting physics and/or physics teaching.

## Preparing a Congress Bid:

A university department which seeks to host a future CAP annual Congress must submit a formal bid to the CAP via the CAP's Executive Director. The bid, submitted via a Letter of Invitation,<sup>3</sup> must include a draft budget, using the CAP's Congress Budget Template<sup>4</sup> and a brief description of facilities at the Congress venue. These must be prepared in consideration of the guidelines and policies of the CAP for Congress planning and hosting, as described in this Congress Kit and its appendices. CAP Council will consider the bid and will vote to approve or reject it depending on the outcome of a feasibility assessment based on the submitted information and the advice of the Congress Advisory Committee.

## Financial Considerations and Budget:

The importance and costs of the effort expended on the annual CAP Congress by the association and its staff are appropriately reflected in the CAP's annual operating budget. As a fraction of total income, Congress revenue is second only to membership fees in significance. Congress revenues can fluctuate significantly from year to year depending on such factors as the size and location of the host institution, the success of national and local fund raising campaigns, and the fees levied for provision of the necessary conference services. The CAP establishes a target for minimum net congress revenue<sup>5</sup>, which is built into the Congress planning and association budgets. This revenue is used to partially offset the salary costs of dedicated CAP Office staff for the time spent directly working on Congress preparations. The year to year variability in the net Congress revenue is buffered by the CAP's Congress Averaging Fund.

The CAP's required minimum net Congress revenue is set at \$56k in 2010 dollars and is indexed by inflation in subsequent years<sup>6</sup>. A bid which falls short of this established target may be considered at the discretion of the Council, provided that sufficient funds are expected to be available in the Congress Averaging Fund to cover the shortfall. The Congress Advisory Committee will review the bid, in light of the Congress Averaging Fund balance and other factors, and will make a recommendation to CAP Council. While it is expected that each host department / Local Organizing Committee will practice appropriate and sound financial management of the Congress budget and will make every effort to return

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<sup>2</sup> The CAP's *Policy on Recognition and Reward of Congress Hosting Department* is included as Appendix B.

<sup>3</sup> A sample *Letter of Invitation and Bid* is included as Appendix C.

<sup>4</sup> A sample budget based on 6000 participants is included as Appendix D. The CAP's *Congress Budget Template* is available in excel format from the CAP's website.

<sup>5</sup> The CAP's *Policy on Congress Revenue Return* is included as Appendix E.

<sup>6</sup> This figure is the net contribution to the CAP after accounting for all Congress revenues and expenses, whether secured/incurred by the CAP office or the LOC. Starting in 2010, overall Congress budgets are prepared/monitored rather than those focussed only on the LOC activities.

the maximum possible revenue to the association, it must be recognized that the CAP bears full financial responsibility in the event that the minimum revenue return is not met.

The significance of the potential financial impact on the association clearly necessitates a close and effective collaboration between the CAP and the host department. As planning for the Congress proceeds, regular communication between all contributing parties is essential in order to ensure success from both a financial and logistical perspective. Typically, the Congress Advisory Committee will hold weekly meetings with the LOC by teleconference beginning in January of the congress year. Potential issues that could lead to a variance from the approved budget need to be identified early and addressed as they become apparent.

## **Documentation and Milestones:**

The following documents mark the key milestones in the planning of a CAP Congress:

1. Congress hosting bid as defined in “Preparing a Congress Bid” section above: submitted to CAP Executive Director by Head/Chair of host department (at least 3 years prior to the Congress date);
2. Memorandum of Understanding<sup>7</sup>: to be signed by the Head/Chair of the host department and the Executive Director of the CAP, within one month of acceptance/approval by Council of their Congress hosting bid.
3. Congress Services Agreement<sup>8</sup>, accompanied by the final Congress Budget, as approved by the CAP’s Congress Advisory Committee, to be signed by the Head/Chair of the host department and the Executive Director of the CAP, no less than 4 months prior to the start of Congress.

A detailed list of milestones relating to the planning of a CAP Congress is included as Appendix G<sup>9</sup>.

## **Committees and Advisory Structures:**

The responsibilities for various elements of a CAP Congress are assigned to appropriate committees, as summarized below. The key responsibilities of the host department are fulfilled by the Local Organizing Committee, as described more fully in the next section.

### ***Program Committee:***

The Program Committee (PC) is responsible for the planning and coordination of the main Congress Program, including the technical sessions, invited and plenary session talks, satellite meetings, the Herzberg Memorial Public Lecture, and the conference banquet. The Program Committee is chaired by the CAP Vice-President. The committee members consist of the Chairs of CAP’s specialized subject divisions (or their designated representative), the Director of Corporate Members, the CAP Executive Director, the Chair of the Committee to Encourage Women in Physics, and a representative of the CAP Science Policy Committee. This Program committee chair, in cooperation with the CAP Office staff, ensures that the program information is made available through the CAP-based Congress website at the earlier opportunity and that all posted information concerning the program is accurate and timely.

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<sup>7</sup> *Memorandum of Understanding* is included as Appendix F.

<sup>8</sup> *Congress Service Agreement* is included as Appendix G.

<sup>9</sup> *Milestone Schedule for Congress Planning* is included as Appendix H.

### ***Congress Advisory Committee and National Fund Raising Committee:***

The Congress Advisory Committee (CAC) consists of the CAP Past-President (Chair), Vice-President, Secretary-Treasurer and Executive Director. This committee is responsible for providing financial oversight to the Congress. It makes recommendations to Council on the Congress hosting bid and on the registration fee schedule. Following approval of a Congress bid, the CAC works with the Local Organizing Committee to develop a final Congress Budget. It oversees both national and local fund raising efforts. The CAC is also responsible for ensuring that CAP's documentation and policies pertaining to Congress matters are current and appropriate.

The National Fund Raising Committee consists of the CAP Executive Director, President, Past President, Vice-President, and Director of Corporate members. It is chaired by the Executive Director, who will, in the Fall preceding the Congress, provide the LOC with the list of organizations that are contacted by the National group to be exhibitors or sponsors<sup>10</sup>. This committee is responsible for conducting CAP's national fund raising efforts in support of its annual Congress.

### ***Local Organizing Committee:***

The Local Organizing Committee, which is overseen by two co-chairs appointed by the host department, is responsible for overseeing all local arrangements for the Congress at the host institution. This includes direct responsibility for local fund raising, including negotiations with the host university for complimentary services or waived fees wherever possible. It also includes the planning, programming, and promotion of the High School Teachers' Workshop. The co-Chairs of the Local Organizing Committee should be in place by the time the Congress hosting bid is submitted to the CAP. By signing the Congress hosting MOU, the Head/Chair of the host department indicates his / her commitment to establishing a LOC of sufficient size and capabilities, and access to appropriate/adequate resources, to ensure that all local responsibilities can be adequately taken care of. The responsibilities of the LOC are detailed in the next section.

### ***Responsibilities of the Local Organizing Committee:***

The Local Organizing Committee (LOC) works closely with the CAP office, the Congress Advisory Committee, the CAP executive, and the Congress Program Committee to plan and produce the Congress. The LOC is encouraged to contribute creative initiatives and program suggestions that take advantage of and showcase the local venue, but final decisions regarding program rest with the Program committee and the proposed Congress Budget must be approved by the CAP Executive and Council. Subsequently, any significant deviations from the approved budget must be also be approved by the CAC.

The primary responsibilities of the Local Organizing Committee are outlined below; more details about specific events and congress elements are given in the following section. In the event that, with the approval of the CAP and the CAP Council, a local conference services company (internal or external to the host institution) is contracted to provide logistical support and take over some of these tasks, it remains the responsibility of the LOC to liaise with the conference services company, the CAC and the CAP Executive Director to ensure that all of the items below are adequately taken care of:

- Coordinating site visit of the CAP Executive Director and VP-Elect in the Fall two years before the Congress to review potential venues for technical sessions and other events.
- Preparing a Congress Poster in time for inclusion with materials for the preceding year's Congress.

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<sup>10</sup> The national office contacts the CAP's Corporate and Institutional members as well as exhibitors and sponsors from previous years. The most recent list is included as Appendix I. It is updated annually.

- In consultation with the CAC, preparing a Congress Budget, including a proposed registration fee schedule and banquet fee, for approval at the CAP Fall Council Meeting prior to the congress.
- Working with the Congress Advisory Committee to prepare an appropriate final budget and completed Congress Services Agreement no later than 4 months prior to the start of Congress; tracking Congress income and expenses and submitting a final report to the CAP Executive Director no more than 10 weeks after the end of Congress<sup>11</sup>.
- Working in collaboration with the National Fund Raising committee to ensure that adequate funds are raised to meet the Congress budget goals. The Local Organizing Committee should have 1-2 members who are designated responsible for local fund raising efforts and for promoting the Congress to potential local sponsors and exhibitors.
- Securing a venue for the Congress Banquet and negotiating an appropriate price and menu including provisions for special dietary requirements. The venue should include facilities for award presentations and announcements. If necessary, the cost of transportation to and from the venue must be factored into the Banquet cost.
- Identifying and securing convenient and accessible venues, along with audiovisual, technical and other support, for all Congress sessions, special events, receptions, and associated meetings. Spaces must accommodate and be appropriate to the sessions and events assigned to them. Distances between venues should allow for reasonable movement between sessions, and routes should be clearly marked.
- Recruiting graduate and undergraduate student volunteers<sup>12</sup> to assist at the Congress; tasks normally include session monitors (assist with A/V, timing, posting session details outside the door, tracking speakers, noting participation), registration package “stuffers”, assist with posting indoor and external signage, assist at the registration desk (normally with pre-registered delegates), handing out programs at the Herzberg lecture, collecting tickets at the various events, and offering general assistance to help delegates find the location of different sessions/events. Students who donate more than 10 hours of their time will be granted a complimentary registration for the Congress. They are also encouraged to participate in the student reception and the post-conference “thank you” lunch.
- Negotiating and securing an appropriate balance of on-campus and convenient off-campus accommodations.
- Organizing the logistics for the Herzberg Public Lecture and the associated evening reception. This also includes publicizing the lecture (including development and circulation of a promotional poster), liaising with local dignitaries who might be invited to deliver welcoming remarks, and arranging a pre-lecture dinner for the speaker and representatives of the LOC and CAP Executive.
- Preparing and distributing appropriate publicity materials for all congress special events, with special emphasis on the Herzberg public lecture and the High School Teachers’ Workshop.
- Encouraging local media coverage, where appropriate, of congress special events or sessions.

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<sup>11</sup> See the CAP’s *Congress Services Agreement* (Appendix G) for further details.

<sup>12</sup> The CAP’s *Guidelines for Recognition of LOC Faculty and Student Volunteers* is included as Appendix J.

- Making appropriate hospitality arrangements. This includes health breaks (coffee and snacks), lunches or breakfasts for specified business or committee meetings, specified receptions, etc. The Local Organizing Committee should also identify available food service sites near the congress venue and ensure that capacity is sufficient to accommodate the anticipated demand from delegates at normal meal times.
- Arranging for the registration desk (to handle pre-registered and onsite registration) and CAP desks. The LOC is responsible for ensuring that the registration arrangements have been made and that the name tags, receipts, and food/event tickets have been prepared and put into envelopes for each pre-registered delegate. The desk should be staffed/supplied to ensure these items can be quickly secured for onsite registrants. A number of complimentary or waived registrations are granted at each congress. The CAP office will provide the appropriate LOC representative with this list prior to making the registration system live.
- Securing material for, and preparing, the congress registration packages. Such information should include information about local restaurants, tourist information, the poster for the next year's congress. The package is handed out together with the program and the delegate's name tag package.
- Hosting the annual meeting of Physics Department Heads and Chairs. The venue should contain projection facilities for the meeting. Traditionally there is either a breakfast or a dinner provided by the local department.

Note that, as of 2010, the Heads and Chairs meeting agenda is set by the Vice-President Elect, in collaboration with CAP Executive and Physics Department Heads and Chairs. The VP Elect, with assistance from the CAP office, is also responsible for issuing invitations, and chairing the meeting. Minutes are taken by the VP Elect or his/ her designate and are produced and distributed following the meeting by the CAP office.

- Providing maps, floor plans of meeting areas, information on parking, accommodations and other relevant local information, for posting on the Congress web site, and for inclusion in the printed Congress Program.
- Arranging suitable venues for exhibits and the poster session and for communicating directly with exhibitors regarding arrangements and exhibit requirements. Where possible, the arrangements for coffee breaks should be designed to maximize delegate traffic through exhibit areas.
- Arranging for complimentary wireless internet access for delegates.
- Securing a venue for, and hosting, a welcoming reception for graduate students (or for all delegates) as appropriate, depending on how this fits with the congress schedule. Recently, this has taken the form of a welcoming barbecue for all participants on the first day of Congress.
- Identifying a local teacher to coordinate the High School Teachers Workshop and working with that teacher to organize, promote, and present the workshop.
- Posting appropriate indoor and external signage to direct delegates to the meeting areas, registration desk, parking, on-campus accommodations (if appropriate), and locations of special events. It is better to err on the side of too much signage than not enough. A good test is to have someone who is not familiar with the congress location and attempt to find a series of locations



- Meeting with representatives of the next year's LOC and the CAC during the Congress to answer questions and offer suggestions and comments.
- Preparing a detailed Congress follow-up report and providing suggestions for updating/revising/correcting conference hosting kit, for submission to the CAP office within three months of the end of Congress.
- Organizing a simple, post-conference "thank you" lunch for the LOC and student volunteers. This is normally something like pizza and non-alcoholic drinks. The cost for this event is included in the Congress budget and approved by the CAP Council as part of the budget approval process.

## Detailed descriptions of Congress elements:

This section provides more detailed information about key elements of a Congress that are mentioned in the LOC responsibilities section above.

### ***Bilingualism***

The CAP is a bilingual organization and will, as much as possible, provide Congress information and services in both official languages. This requirement **MUST** be met for the congress website, the congress program, signage at Congress, and service at the registration desk (at least one person at the desk should speak French). As much as possible, and certainly where essential, all printed material related to congress which will be distributed/circulated to all CAP members and/or delegates. Should the LOC have the capability to produce material in both official languages, it should do so. In instances where this is not immediately available, then material should be submitted to the CAP office to arrange for translation. As much as possible, where material is going to be made public, this should not be done until it is available in both official languages.

### ***Website***

The Congress website is hosted on the CAP's webserver. The LOC will assign a member to be responsible for providing the local information required for the website. The CAP office will arrange to grant access to the website for this individual so that he/she can post this information directly and ensure that it is kept accurate and timely.

### ***Herzberg Public Lecture and Reception:***

First and foremost, it must be kept in mind that this talk is intended to be a **public** lecture. Therefore, all arrangements must be made with a view to encouraging the public to attend the talk (i.e. central location, adequate seating, ease of access and parking, notifying local media, distributing posters at high schools and other appropriate locations, etc.).

The Herzberg Public Lecture is a key element of the congress, and particular care should be paid to its organization. The selection and invitation of the Herzberg Lecturer is the responsibility of the CAP Executive with input from the Program Committee and the Local Organizing Committee<sup>13</sup>. Travel and accommodation expenses for the Herzberg Lecturer are charged to the Congress Account. The LOC is responsible for securing a suitable venue with the capacity to accommodate most of the anticipated

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<sup>13</sup> A history of the Herzberg public lecture (in English only) is available from the CAP's Congress website at <http://www.cap.ca/en/activities/cap-congress> .

registration plus at least 100 members of the public. The LOC is also responsible for making arrangements to have the lecture recorded for archival purposes, upon consent of the speaker. The LOC should also arrange for a reception, with light refreshments, for delegates to follow the Lecture. The LOC is encouraged to seek sponsorships to offset costs associated with the lecture and the reception. The LOC should also make arrangements for a pre-lecture dinner to be attended by the lecturer, a representative of the CAP executive and one or two other selected guests.

The LOC should promote the Herzberg public lecture widely within the region of the host institution. In particular, local physics teachers should be made aware of the lecture, and it should be made clear that high school students are welcome. A poster for the event should be prepared and submitted to the CAP executive for approval in time for wide regional and national distribution. Interviews or news releases promoting the Herzberg Lecture can be particularly effective in drawing attention to the department and the Congress. The CAP office has prepared guidelines for promoting the public lecture<sup>14</sup>.

In planning the evening's program, the focus must be on the lecture itself. The lecture generally starts at 19:30 hr. The LOC is responsible for preparing a slide show to run in a continuous loop while the audience is being seated, to acknowledge the event sponsors and highlight some of the CAP's public outreach activities, e.g. the Art of Physics Competition. The program should begin with a welcome to the delegates from a representative of the host institution, who should be recruited for this purpose by the LOC. The full event including the lecture and question period should be completed in about an hour and a half. Except for very special occasions, additional entertainment should not be provided as an addition to the program. Incidental music prior to the beginning of the formal program may be approved by the CAP executive if the costs are borne through sponsorship. A printed program for the evening is prepared by the CAP office, with input from the LOC.

The reception usually involves a cash bar and hors d'oeuvres with delegates being given one complimentary drink ticket. A banner or poster acknowledging sponsorship at the reception would be appropriate.

### ***Congress Banquet and reception:***

The LOC should identify a venue and obtain an estimate of banquet costs well in advance of the CAP Council meeting at which the Congress budget is submitted for approval. Considerations include cost, space, accessibility, ability to accommodate special dietary requirements, etc. It is usual to provide delegates with one drink ticket for the reception preceding the banquet, charged to the Congress budget, and to provide two bottles of wine per table included in the cost per ticket. A number of complimentary banquet tickets are handed out; normally these are limited to CAP medallists, office staff, finalists in the student paper and poster competitions (some tickets are provided by their divisions), student prize exam winners, faculty members of the LOC, and special guests identified by the executive. Complimentary tickets must be approved by the CAP executive.

The program for the banquet evening is set by the CAP executive. The outgoing CAP President acts as the Master of Ceremonies. After dinner, award winners are recognized. Except for the CAP-COMP Kirkby Medallist, for whom no plenary is normally scheduled, responses should be limited to less than a minute. The CAP-COMP Kirkby Medallist can be allowed a few minutes in which to respond to the award. Finalists in the student paper and poster competitions are also recognized. A podium, microphone, and table for prizes need to be provided. Several tables will be reserved for award winners; the exact number will be communicated to the LOC by the CAP office prior to the event. A booklet outlining the event is prepared by the CAP office. At least one copy per table will need to be laid out.

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<sup>14</sup> The CAP's *Guidelines for the Successful Promotion of the Herzberg Public Lecture* is included as Appendix K.

### ***Registration Area:***

The registration area should be centrally located, and routes to it (from closest parking, on-site accommodation, meeting room locations) should be clearly marked. The registration area should be set up to efficiently deliver registration packages to pre-registered delegates as they arrive while also accommodating on-site registrants. A message board for delegates should be located close to the registration area. A table with local information should also be set up. A separate table with a bulletin board should be set up nearby to provide information about the student competitions. A table or nearby office with a printer should be provided for use of CAP personnel.

The registration table should be staffed starting at least 30 minutes prior to the first session (45 min to 1 hour prior on the first day of congress is preferred) and remain staffed at least until the end of the afternoon sessions each day. Ideally, someone at the registration desk should be able to contact a senior member of the LOC, or CAP personnel, to deal with contingencies that might arise. A secure space near the registration area should be provided for safe storage of CAP and LOC materials overnight.

### ***Sunday Symposia:***

Up until 2009, a number of CAP divisions scheduled Symposia and/or regular sessions on Sunday. These tended to require some of the larger session rooms, and divisions typically exercised a little more freedom in scheduling sessions on Sunday. Divisions will typically indicate their interest in running Sunday programming at the Fall program meeting and these requirements will be transmitted to the LOC. The 2010 Congress adopted a longer 4.5 day (Mon-Fri.) scheduling model for the first time, and Sunday symposia were therefore not included.

### ***Plenary sessions:***

Plenary talks are presented by various CAP award and medal winners and by up to three plenary speakers selected by the Program Committee. The LOC should identify a suitably large and centrally-located venue for the plenary sessions, as advised by the Program committee on their timing and anticipated audience size. It is preferable that the same room be used for all of the plenary sessions held during Congress.

### ***Parallel sessions:***

The LOC should identify an adequate number of rooms to be used for parallel technical sessions, on the advice of the Program Committee. A typical congress features between 8 and 10 parallel sessions; however, a high volume congress (such as the 2010 congress which had over 800 delegates) may feature up to 12 parallel sessions. It is highly advisable to schedule one additional room to be held as a 'spare' in case of a last minute "schedule problem" or request for additional meetings etc. The majority of rooms should accommodate 80-120 audience members, and all of the rooms should be equipped with data projectors (overhead projectors should be available if needed). Ideally, all of the rooms used should be within about 5 minutes walking time of each other. An attendant (usually a student volunteer) from the host institution should be assigned to assist with projection and other audiovisual needs in each room and to track speakers as well as participation levels in the sessions. The attendant should have a way to communicate quickly with a senior member of the LOC in the event that technical difficulties arise.

### ***Exhibit area:***

Exhibitors contribute enormously to the success of a CAP Congress. They should be made to feel welcome, and their particular schedule / accommodation requests should be given serious consideration. One or two LOC members should be assigned to recruit and accommodate exhibitors. The recruitment of exhibitors should begin at the preceding Congress where a representative of the incoming LOC should

invite each exhibitor personally to attend the following year's Congress. The fees for exhibitors must be proposed and approved as part of the Congress budget. Basic exhibitor booths should include standard covered tables, partitions, chairs, internet access and the option to acquire one complimentary banquet ticket. Provision for electricity and other requirements should be made where pre-requested by an exhibitor, with costs borne by the exhibitor as necessary.

The exhibit area should be in close proximity to the session venues. Coffee and snacks should be located so as to draw delegates through the exhibit area. Exhibitors should be offered an opportunity to sponsor coffee and/or food and appropriate signage should be placed on the refreshment tables recognizing any exhibitor who chose to do so. Delegates should be encouraged to visit and meet with exhibitors. If possible, the poster area should be integrated closely with the exhibit area and exhibitors should be encouraged to attend the poster session.

### ***Poster session:***

If possible, the space for the poster session should be closely integrated with the exhibits area. The number of poster boards needed should be estimated based upon the accepted poster abstracts plus 10 for late submissions and 4 for the Art of Physics exhibition. Poster board dimensions should be communicated to the CAP office by mid-January, for posting on the Congress web site and inclusion in the confirmation messages sent to congress delegates.

The poster area should be available for delegates to mount their posters during the morning of the day of their poster session. Poster board numbering should be consistent with the labelling used in the Congress program. The LOC should liaise with the Chief Judge for the student competitions regarding planning and logistics for the poster competition, including identification of finalists etc. and the provision of a nearby meeting space to accommodate the judges' meeting following the session. If an exhibitor has agreed to sponsor prizes for the poster session, that exhibitor's logo could be used on tags to identify the competitors and finalists.

It is typical for food and refreshments to be made available at the poster session, with one complimentary poster session drink ticket provided to each delegate, regardless of number of poster sessions scheduled during congress.

### ***High School Teachers' Workshop (or Teachers' Day):***

As soon as the Congress has been approved, the LOC should recruit a local high school physics teacher to coordinate the High School Teachers' Workshop in cooperation with a designated LOC representative. This team should communicate with the local school boards to identify the best day on which to hold the Workshop and take the necessary actions to try to ensure that physics teachers can obtain the day off to attend the workshop. The preferred date should be communicated to the Congress Program Chair as soon as possible, but prior to the first Program Committee meeting held in the Fall preceding congress, so that the scheduling of the CAP Teaching Medal award session and relevant sessions organized by the Division of Physics Education take this date into account. There is no registration fee for high school / CEGEP physics teachers attending the workshop. Delegates who wish to do so, may register to participate to attend additional Congress sessions at no cost.

The day normally begins with a continental breakfast, where delegates can pick up their registration package or register on-site, before the workshop starts at 9:00 am. Delegates who pre-register are provided with complimentary conference bags. All delegates are provided the opportunity to join CAP as Affiliate Members for a special reduced fee (typically \$30) if they complete and submit the supplied application form to the coordinators during the workshop. The coordinators are responsible for submitting the forms to the CAP staff prior to the close of Congress.

A sponsored lunch is provided – traditionally, support for the workshop lunch, and a lunchtime speaker, has been provided by the Canadian Institute for Photonic Innovation (CIPI), arranged via the CAP office. The LOC is responsible for promoting and advertising the event to local high school teachers.

### ***Executive, Council, and Ancillary Meetings:***

The LOC should identify suitable venues for a series of meetings that take place just before the start, during, and at the end of Congress. The CAP Executive and Council meet for a full day (Executive first in the morning, then Council in the afternoon) the day immediately before the Congress begins. There is a subsequent meeting of the Executive, usually as a breakfast meeting on the final day of Congress, as well as a joint meeting of Old and New CAP Councils held on the last afternoon of the Congress. A board room with seating for about 50 can usually accommodate these meetings.

Other groups that meet during Congress and will need appropriate space and catering services are listed below. A full list and schedule for these meetings, as well as an indication as to whether responsibility for costs are borne by the Congress, the CAP, or the other organization, will be provided to the LOC by the CAP Executive Director, in consultation with the Program Committee and other groups as appropriate, well in advance of the congress:

- The Institute of Particle Physics (IPP) Board of Trustees, which meets immediately before the IPP General Meeting, the latter which should accommodate 80-100 participants (separate refreshments may be required);
- The Canadian Institute for Nuclear Physics (CINP) Board, and annual meeting;
- The CAP-NSERC Liaison Committee, arranged by the CAP Executive (often a dinner meeting).
- The Physics Department Heads/Chairs (usually includes a breakfast or light dinner depending on when the meeting is scheduled)
- The Educational Trust Fund Trustees
- The Canadian Journal of Physics Editorial Board (usually a dinner meeting)
- The Physics in Canada Editorial Board (usually a breakfast meeting)
- The CAP Past Presidents (usually a lunch meeting)
- The Friends of CAP (usually a breakfast meeting)
- The Canadian National IUPAP Liaison Committee (usually a breakfast meeting)
- The NSERC New Faculty Meeting (usually a breakfast meeting)

### ***The CAP Annual General Meeting:***

The CAP Annual General Meeting is normally scheduled in the late afternoon and, if necessary, may precede the congress banquet (in these cases, the scheduling and location for this meeting should be chosen so that participants have time to travel to the Banquet and Reception after the Annual General Meeting). This meeting should be held in a space with seating for at least 150 delegates and a table at the front for 4-6 of the CAP executive. There should be microphones available on the front table. Data projectors should be provided for this meeting (overhead projectors should be available if requested) – typically, parallel presentations are shown in both French and English, requiring two projectors and two

screens. If possible, small tables should be available near the entrance doors where meeting materials can be made available for pick-up.

### ***Divisional business meetings:***

Most CAP divisions also schedule their business meetings during Congress. These are typically held during lunch and require box lunches to be provided. During Congress registration, delegates are asked to identify divisional meetings that they will be attending and prepay the cost of their box lunch. Some divisions conduct their business at breakfast meetings. A detailed schedule and requirements for these meetings will be provided to the LOC by the CAP Executive Director, with input from the Program Committee. Ideally, a meal ticket that identifies the division and date of meeting should be included in the registration packages of all delegates who purchase a lunch, both as a reminder that they have done so and a means for the LOC/Division Chair to ensure that the individual is entitled to the lunch when distributing same at the meeting.

### ***Heads & Chairs Meeting:***

The annual meeting of Physics Department Heads and Chairs has been typically conducted as a breakfast meeting before the start of Congress; in 2010, with the new 4.5 day format, the Heads and Chairs meeting was scheduled as a dinner meeting in midweek. This meeting is sponsored by the host institution. Provisions should be made for a data projector and screen to be used for presentations during this meeting.

Starting in 2010, the Heads and Chairs meeting agenda is set by the Vice-President Elect, in collaboration with CAP Executive and Physics Department Heads and Chairs. The VP Elect, with assistance from the CAP office, is also responsible for issuing invitations, and chairing the meeting. Minutes are taken by the VP Elect or his/ her designate and are produced and distributed following the meeting by the CAP office

### ***Student reception:***

The host institution typically organizes a reception for graduate students on the first day of the Congress. This may be combined with a more general welcoming reception for all delegates, if desired or should sponsorship for the student reception not be secured. The welcoming reception is attended by the Vice-President Elect and the CAP Director of Graduate Student Members.

### ***Student competitions:***

Graduate and undergraduate students submitting abstracts to the CAP Congress can opt to participate in competitions for the Best Student Oral or Poster presentation. The Competitions are organized by the CAP Past President with the cooperation of Division Chairs and the LOC member responsible for the Poster session. A number of divisions also sponsor prizes for students submitting papers to the competition through that division.

Guidelines for these competitions are posted on the CAP website. All presentations are pre-screened, either in the divisional technical sessions (oral), where they are also considered for divisional prizes, or as poster contributions, prior to the scheduled poster session at Congress. Finalists for the poster competition are announced before the scheduled poster session; they are visited during that session for assessment by a panel of judges. Finalists for both the oral and the poster competitions are announced in the afternoon prior to the Congress banquet and are given complementary tickets to the banquet, where the rankings are announced for the division competitions and poster competition, and prizes are

awarded to these competitors as well as the finalists for the oral competition. Finalists for the oral competition proceed to the CAP final student competition session, typically scheduled on the last day of the congress. The ranking of the finalists is announced shortly after completion of the competition, and winners are presented with their certificates and cheques before the end of Congress.

### ***Science Policy Session:***

Recent Congresses have included a variety of Science Policy Sessions. These are generally Plenary sessions and can take various forms, including talks and panel discussions, depending on the topic being addressed and the participants involved. The nature of the Science Policy Session at a given Congress is typically suggested by the Science Policy Committee representative assigned to the program committee, and determined by the CAP executive with input from the Program Committee and, where appropriate, the LOC. These sessions are typically opened up to anyone at the host institution or nearby who wishes to attend, at no cost.

### ***CEWIP session:***

The Committee to Encourage Women in Physics traditionally holds a combined oral presentation session and business meeting late on Monday afternoon. The exact timing of the session is determined during the congress planning sessions. One of the larger spaces should be used for this session. Food and refreshments are often provided at this meeting.

### ***NSERC New Faculty workshop:***

Depending on the availability of NSERC staff and sponsorship, if there is sufficient interest, a workshop for new faculty applying to NSERC is typically held during the Congress. Often there is a breakfast or lunch provided as part of this session.

### ***E-mail/internet access:***

The host institution provides a means for delegates to access e-mail and the internet. Increasingly this is through an existing wireless network, but access to computers somewhere near the Congress site is also desirable. As e-mail/internet access is one of the most highly, and frequently, used services provided during the congress, a high bandwidth/fast response system should be established for Congress delegates (the highest levels of complaints from congress delegates come when there is limited or sporadic e-mail/internet access). Access information should be provided to the CAP office for posting online and inclusion in the printed program. A sheet which includes this information, plus login instructions, should be prepared by the LOC, for inclusion in the delegate registration packages.

## **Special Congresses**

While every CAP Congress is unique, most follow the basic template described in this kit. Some Congresses are distinguished, however, by their association with a particular celebration within the host institution or region, or by being organized in partnership with sister societies, e.g. COMP, CASCA, etc. Special Congresses can be particularly rewarding, but they require flexibility on the part of all organizers and participants. The extent to which a Special Congress can depart from the basic template depends on the extent to which costs associated with the departure can be offset by sponsorship or by economies arising from collaboration with partner societies. Proposals for a Congress with special elements are welcome but must be made to the CAP executive well in advance and will need to be carefully considered to ensure that CAP's goals and objectives for a successful congress can be met under the circumstances.

## APPENDIX A TO THE CAP CONGRESS KIT DATED SEPT. 10, 2010-09-12

### PREVIOUS 30 CAP CONGRESSES

YEAR	LOCATION	NUMBER OF PARTICIPANTS
2010	University of Toronto	855
2009	Université de Moncton	418
2008	Université Laval	642
2007	Univ. of Saskatchewan	601
2006	Brock University	460
2005	University of British Columbia	585
2004	Delta Hotel Winnipeg (U. Manitoba) (CAP/CASCA/COMP/BSC)	688
2003	University of Prince Edward Island	501
2002	Quebec City (Photonics North)	1089
2001	University of Victoria	389
2000	York University	495
1999	University of New Brunswick	303
1998	University of Waterloo	433
1997	University of Calgary	360
1996	University of Ottawa	485
1995	Université Laval (CAP/APS/SMF)	1000 (662 CAP)
1994	University of Regina	280
1993	Simon Fraser University	405
1992	University of Windsor	401
1991	University of Manitoba	332
1990	Memorial University of Newfoundland	287
1989	University of Guelph	473
1988	Université de Montréal (CAP/APS)	620
1987	University of Toronto	656
1986	University of Alberta	350
1985	University of New Brunswick	349
1984	Université de Sherbrooke	552
1983	University of Victoria (CAP/CASCA)	545
1982	Queen's U. and Royal Military College, Kingston	494
1981	Dalhousie University	402
1980	McMaster University	511



## APPENDIX B TO THE CAP'S CONGRESS PLANNING KIT DATED SEPT. 10, 2010

### **CAP's policy on *Recognition and Reward of Congress Hosting Departments***<sup>1</sup>

To recognize and reward the work done by the Local Organizing Committee (LOC) to contribute to revenues of the annual CAP Congress, it is resolved that the CAP shall award the host university's Physics Department an honorarium equivalent to 20% on all sponsorship from local sources<sup>2</sup> and on all income from exhibitors recruited by the LOC who have not previously exhibited at a CAP Congress.

Such money is to be used by the host department for initiatives promoting physics and/or physics teaching. The name of the CAP should be associated with each of these initiatives. The honorarium will be presented to the LOC Chair at the Congress banquet, at which time the LOC Chair will be invited to outline plans for how the honorarium will be spent.

#### **National Congress Fund Raising Committee**

To complement the work done by the LOC to raise funds locally in support of the annual CAP congress, the CAP shall establish a National Congress Fund Raising Committee. This committee shall consist of the CAP President, Past President, Executive Director, Secretary-Treasurer, Director of Corporate Members, and a representative member of the Science Policy Committee. This committee shall be responsible for fund raising at the national level, including NSERC and other government sources, CAP's Corporate Members, and other regular sponsors and exhibitors who attend Congress from year to year.

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<sup>1</sup> Approved by CAP Council, Oct. 4, 2008

<sup>2</sup> "Sponsorship from local sources" refers to sponsors that are not on the list of institutions or firms to be contacted "at the national level", i.e. by members of the CAP National Congress Fund Raising Committee.

**TEMPLATE OF LETTER OF INVITATION AND CONGRESS BID**  
**-- ON HOST INSTITUTION LETTERHEAD**  
(to be submitted with preliminary budget)

**Date**

Mrs. Francine Ford  
Executive Director, Canadian Association of Physicists  
Suite 112, MacDonald Building  
University of Ottawa  
150 Louis Pasteur Priv.  
OTTAWA ON K1N 6N5

**Bid for CAP Congress for 2013 or 2014**

Dear Francine:

The Department of Physics at the University of xxx is hereby submitting a bid to the Canadian Association of Physicists to host its Annual Congress at the University of xxx in 2013 or 2014. To this end, a CAP Congress Preliminary Planning Committee has been formed, consisting of:

- Person A      *(research/professional area of person A, e.g. Condensed Matter)*
- Person B      *(research/professional area of person B, e.g. Education/Teachers' Workshop)*
- Person C      *(research/professional area of person C)*
- Person D      *(research/professional area of person D)*
- Person E      *(research/professional area of person E)*

This committee, chaired by Person A, will be charged with identifying possible specific dates for a Congress in xxx, as well as investigating possible congress session sites, accommodation arrangements, support funding, and co-located meetings.<sup>1</sup>

As requested in the Congress Planning Kit, we attach a preliminary, draft budget for the proposed Congress. The budget was prepared using reasonable estimates for (at least) the major expenditures and revenue sources. You will note that our preliminary estimates indicate that we can meet the target contribution to CAP's operating funds of \$xxk with xxx delegates and a modification of x% to the registration fees included in the template. Should our bid be accepted,

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<sup>1</sup> Our organizing committee would work to arrange that the xxx meeting was held at this meeting and would investigate the possibility of related societies holding their meetings at the same time, e.g. COMP.

we look forward to working with the CAP's Congress Advisory Committee over the next few months as we finalize the budget and start preparations for the Congress.

[include short description of institution here] - The University of xxx is a large institution of nearly xxx students located on the xxx side of the City of xxx. It has extensive lecture hall and residence accommodations, with a number of hotels within walking distance of campus. Getting to and from xxx is relatively easy, with regularly scheduled airline service to nearly xxx Canadian cities from coast to coast.

[include short description of department here] - The Department of Physics in xxx currently includes xxx regular faculty members, over xxx graduate students, and about xxx undergraduate Physics majors. Areas of research activity include: Astronomy and Astrophysics, ... The University of xxx is also home to the Institute for xxx.

In summary, the Department of Physics at the University of xxx is a vibrant and growing institution with a rapidly increasing involvement in the national and international physics community. We believe that our institution can host a successful congress that delivers the targeted contribution to the CAP's operating fund.

We look forward to an opportunity to host the CAP Congress.

Sincerely,

[Name]  
Head of Department

Phone:  
e-mail:

[Name, if want 2<sup>nd</sup> signatory]  
[Position]

Phone:  
e-mail :

encl. Preliminary Congress budget

Based on 600 participants

(approved by CAC on Mar.24/10)

June 6 to 11, 2010

Item	Notes	# People- Items	Net cost	Tax	Total	Total per Event
<b>EXPENSES</b>						
<b>Meeting Requirements</b>						
Auditorium	1 room for 4 days	4	\$400.00	\$0.00	\$1,600.00	
Meeting room rentals	12 rooms for 5 days	60	\$120.00	\$0.00	\$7,200.00	
AV rentals	13 rooms for 5 days	65	\$120.00	\$0.00	\$7,800.00	\$16,600.00
<b>Poster Presentations</b>						
Poster board rentals	Complimentary	70	\$0.00	\$0.00	\$0.00	
Poster board delivery	Estimate for van rental & labour	1	\$400.00	\$0.00	\$400.00	
Supplies	Pins for boards	1	\$50.00	\$6.50	\$56.50	
Catering	Reception food -snack & drink	480	\$6.00	\$0.78	\$3,254.40	
Drinks	1 ticket per person	480	\$5.00	\$0.65	\$2,712.00	\$6,422.90
<b>Exhibit Booths</b>						
Furnishing rentals	Tables, chairs	15	\$50.00	\$6.50	\$847.50	
Security	Depending on location	1	\$1,200.00	\$156.00	\$1,356.00	
Space rental		1	\$1,600.00	\$208.00	\$1,808.00	
Box lunches			\$0.00	\$0.00	\$0.00	
Banquet tickets		15	\$60.00	\$7.80	\$1,017.00	\$5,028.50
<b>BBQ Prior to Herzberg</b>						
Hart House rental	Great Hall, foyer & quad	1	\$900.00	\$117.00	\$1,017.00	
BBQ dinner		500	\$20.00	\$5.60	\$12,800.00	
Drinks	1 ticket per person	500	\$6.00	\$1.68	\$3,840.00	\$17,657.00
<b>Herzberg Lecture</b>						
Room rental	McLeod Auditorium	1	\$300.00	\$0.00	\$300.00	
Catering		500	\$10.00	\$1.30	\$5,650.00	
Drinks	Cash bar set-up	1	\$800.00	\$104.00	\$904.00	
Advertising		1	\$1,500.00	\$195.00	\$1,695.00	
Video recording of lecture		1	\$500.00	\$65.00	\$565.00	\$9,114.00
<b>High School Program</b>						
Postage & deliveries		1	\$350.00	\$45.50	\$395.50	
Printing & photocopying		1	\$350.00	\$45.50	\$395.50	
Name badges		50	\$3.00	\$0.39	\$169.50	
Coffee break		50	\$5.00	\$0.65	\$282.50	
Lunch	Private site down with AV	50	\$20.00	\$2.60	\$1,130.00	\$2,373.00

**NOTE:** This is the budget that was approved for the Toronto congress, with an anticipated participation of 600. Every conference budget will be unique based on location / size of congress / local costs. For example, many of the expenses in this budget reflect costs particular to hosting the conference in the downtown area of Canada's largest city. We would expect lower costs in other locations.

<b>General Catering</b>						
Coffee breaks	8 breaks for 80% of participants	3840	\$5.00	\$0.65	\$21,696.00	\$21,696.00
<b>Graduate Student Reception</b>						
Catering		150	\$0.00	\$0.00	\$0.00	
Drinks	1 drink ticket	150	\$0.00	\$0.00	\$0.00	\$0.00
<b>Other Catering</b>						
Volunteer lunch		25	\$25.00	\$3.25	\$706.25	
New faculty breakfast	Recoverable 50%	15	\$7.50	\$0.98	\$127.13	\$833.38
<b>Banquet</b>	Off site venue - self supporting	350			\$0.00	
Complimentary dinners	Based on Hart House	45	\$63.70	\$8.28	\$3,239.15	\$3,239.15
<b>Print Materials &amp; Office Expenses</b>						
Signage	Directional & easel	1	\$480.00	\$62.40	\$542.40	
Registration	Envelopes, drink tickets, etc.	600	\$2.00	\$0.26	\$1,356.00	
Name badges	Holders, lanyards, inserts	600	\$3.00	\$0.39	\$2,034.00	
LOC expenses	Recoverable UofT	1	\$0.00	\$0.00	\$0.00	
Supplies & Postage		600	\$1.00	\$0.13	\$678.00	\$4,610.40
<b>Promotion</b>						
Web site hosting	Recoverable UofT	1	\$0.00	\$0.00	\$0.00	
Web site management	Recoverable UofT	1	\$0.00	\$0.00	\$0.00	
Graphic design	Recoverable UofT	1	\$0.00	\$0.00	\$0.00	\$0.00
Ottawa committee meeting travel costs	Fall 2009 LOC Ottawa meeting	1	\$500.00	\$65.00	\$565.00	\$565.00
<b>Conference staff</b>						
Paid staff	1 manager 6 days & 1 staff 5 days	1	\$5,000.00	\$250.00	\$5,250.00	
Security	Sunday tbd	10	\$60.00	\$0.00	\$600.00	\$5,850.00
<b>Registration &amp; On Site Expenses</b>						
Credit card charges	3.5% of fees				\$6,228.23	
GST	5% included in registration fees				\$8,897.47	
Registration equipment		1	\$600.00	\$78.00	\$678.00	
CAP office equipment	Printer, internet access, etc.	1	\$600.00	\$78.00	\$678.00	
Internet access for delegates	set-up fee	1	\$200.00	\$26.00	\$226.00	\$16,707.70
<b>Conference Management</b>						
Polestar	\$38 per person	600	\$38.00	\$1.90	\$23,940.00	\$23,940.00
Software registration			\$600.00			\$600.00
Congress reg'n system						

<b>TOTAL EXPENSES</b>		600				<b>\$135,237.02</b>
Average Cost per person						\$225.40
<b>INCOME</b>	<b>fraction of paying registrants</b>			<b>GST 5%</b>		
<b>Full Conference Registration fees - Early</b>						
Complimentary registrations		32	\$0.00	\$0.00	\$0.00	
Member / Invited early	0.415	236	\$355.00	\$17.75	\$87,906.97	
Non-member early	0.038	22	\$455.00	\$22.75	\$10,311.76	
Member Grad Student / Retired	0.193	110	\$180.00	\$9.00	\$20,718.94	
Non-member Grad / Retired	0.012	7	\$230.00	\$11.50	\$1,604.91	
Undergraduate	0.015	8	\$105.00	\$5.25	\$914.28	
<b>Full Conference Registration fees - Late</b>						
Member / Invited late	0.111	63	<b>\$405.00</b>	\$20.25	\$26,835.32	
Non-member late	0.018	10	<b>\$505.00</b>	\$25.25	\$5,270.69	
Member Grad Student / Retired - late	0.044	25	<b>\$230.00</b>	\$11.50	\$6,021.85	
Non-member Grad / Retired - late	0.012	7	<b>\$255.00</b>	\$12.75	\$1,824.98	
Undergraduate	0.021	12	<b>\$140.00</b>	\$7.00	\$1,711.67	
<b>One Day Registration fees - Early</b>						
Member / Invited early	0.032	18	\$205.00	\$10.25	\$3,936.84	
Non member early	0.000	0	\$245.00	\$12.25	\$0.00	
Member Grad Student / Retired	0.012	7	\$105.00	\$5.25	\$732.68	
Non Member Grad Student / Retired	0.003	2	\$125.00	\$6.25	\$216.20	
Undergraduate	0.006	3	\$70.00	\$3.50	\$250.49	
<b>One Day Registration fees - Late</b>						
Member / Invited late	0.050	28	<b>\$245.00</b>	\$12.25	\$7,262.06	
Non member late	0.009	5	<b>\$285.00</b>	\$14.25	\$1,495.77	
Member Grad Student / Retired	0.006	3	<b>\$125.00</b>	\$6.25	\$432.39	
Non Member Grad Student / Retired	0.006	3	<b>\$145.00</b>	\$7.25	\$501.57	
Undergraduate	0.000	0	<b>\$85.00</b>	\$4.25	\$0.00	
<b>Total</b>	1.000	<b>600</b>			<b>\$177,949.36</b>	<b>\$177,949.36</b>
<b>Exhibitor Booth Sales</b>		15	\$1,000.00	\$0.00	\$15,000.00	\$15,000.00
<b>Locally-raised Sponsorship</b>		1	\$10,000.00	\$0.00	\$10,000.00	\$10,000.00
<b>Nationally-raised Sponsorship</b>		1	\$10,000.00	\$0.00	\$10,000.00	\$10,000.00
<b>Contribution from Herzberg bequest</b>	annual interest earned on fund	1				
<b>TOTAL REVENUE</b>						<b>\$212,949.36</b>
<b>Above revenue minus expenses</b>	<b>Our target here is at least \$76k (historical average). Should exceed this.</b>					<b>\$77,712.34</b>

<b>Congress Expenses Paid Directly by CAP</b>					
Congress bags for HS teachers		65	\$6.70	\$0.00	\$435.50
T-shirts for student volunteers/LOC		40	\$15.00	\$0.00	\$600.00
Congress poster		1	\$1,482.00	\$0.00	\$1,482.00
CAP Best student paper awards		2	\$700.00	\$0.00	\$1,400.00
AECL Best student paper award	(this is sponsored)	2	\$300.00	\$0.00	\$600.00
LOC-CAC conference calls		1	\$200.00	\$0.00	\$200.00
Herzberg program / banquet booklet		1	\$800.00	\$0.00	\$800.00
Site visit		1	\$600.00	\$0.00	\$600.00
CAP office staff travel to congress		2	\$2,200.00	\$0.00	\$4,400.00
Herzberg speaker travel/gift		1	\$1,500.00	\$0.00	\$1,500.00
Congress program		1	\$5,000.00	\$0.00	\$5,000.00
Unanticipated expenses		1	\$3,000.00	\$0.00	\$3,000.00
					\$20,017.50
<b>Net Contribution to CAP Operating Fund</b>					<b>\$57,694.84</b>

<b>Recoverable Meal Functions</b>					
Head & Chairs dinner	Hosted by UofT	60	\$20.00	\$2.60	\$1,356.00
CAP/NSERC New faculty breakfast	Recoverable 50%	15	\$7.50	\$0.98	\$127.13
Division lunch	Recoverable		\$25.00	\$3.25	\$0.00
CEWIP reception	Recoverable		\$25.00	\$3.25	\$0.00
CAP/NSERC Liaison dinner	Recoverable 50%	10	\$30.00	\$3.90	\$339.00
IPP coffee break	Recoverable		\$5.00	\$0.65	\$0.00
CNILC breakfast	Recoverable		\$0.00	\$0.00	\$0.00
CINP lunch	Recoverable		\$25.00	\$3.25	\$0.00
Exhibitor hosted lunch	To be hosted or excluded	0	\$20.00	\$2.60	\$0.00
Friends of CAP reception	Recoverable 100% CAP	30	\$20.00	\$2.60	\$678.00
Past presidents lunch	Recoverable 100% CAP	15	\$25.00	\$3.25	\$423.75
<b>Council/Executive Expenses</b>					
Executive Breakfast/break	Pre conference	15	\$15.00	\$1.95	\$254.25
Executive Breakfast	Post conference	15	\$15.00	\$1.95	\$254.25
Council Lunch/break	Pre conference	40	\$25.00	\$3.25	\$1,130.00

## **APPENDIX E TO THE CAP'S CONGRESS PLANNING KIT DATED SEPT. 10, 2010**

### **Canadian Association of Physicists Policy on Congress Revenue Return to the CAP**

- S. Page, March 24, 2009

Updated August 12, 2010

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The Annual Congress of the Canadian Association of Physicists (CAP) is the most important general physics conference in Canada. The importance and costs of the effort expended on the annual CAP Congress by the association and its staff are appropriately reflected in the CAP's annual operating budget. As a fraction of total income, Congress revenue is second only to membership fees in its contribution to the financial well-being of the association. Unlike the basic membership income, which is relatively stable, Congress revenues can fluctuate significantly from year to year depending on such factors as the size and location of the host institution, the success of national and local fund raising campaigns, and the fees levied for provision of the necessary conference services.

Based on historical revenue returns and the needs of the association, CAP policy specifies an appropriately adjusted minimum revenue return to the association, which is built into the Congress planning and association budgets. This revenue return is used to partially offset the salary costs of dedicated CAP Office staff for the time spent directly working on Congress preparations, as well as to cover the direct costs of Congress that are incurred by the CAP office. The year to year variability in the actual revenue return to the association is buffered by the CAP's Congress Averaging Fund.

While it is expected that each host department / Local Organizing Committee (LOC) will practice appropriate and sound financial management and will make every effort to return the maximum possible revenue to the association, it must be recognized that the CAP bears full financial responsibility in the event that the minimum revenue return is not met. It is the responsibility of the LOC to prepare a realistic and detailed Congress budget, taking into account CAP's policy on *Recognition and Reward of Congress Hosting Departments (2008)*.

To protect the interests of all parties, bids to host future Congresses shall be subject to the following conditions for approval and subsequent implementation, beginning in 2010:

1. The target for minimum revenue return to the CAP from an annual Congress, after taking into account all revenues and expenses processed by the LOC and the CAP office, shall be \$56k (2010 dollars) and shall be indexed by inflation in subsequent years.
2. A university seeking to host a CAP Congress shall submit a formal bid in writing to the Executive Director, accompanied by a proposed budget, demonstrating how the minimum revenue return target is to be met. Bids falling short of the established target may be considered at the discretion of the Council, provided that sufficient funds are expected to be available in the Congress Averaging Fund to cover the shortfall.
3. The Congress Advisory Committee shall review the Congress bid, in light of the Congress Averaging Fund balance and other factors, and shall make a recommendation to CAP Council.
4. Approval of a Congress bid shall be conditional on the signing of a Memorandum of Understanding between the CAP and the host university, specifying the target minimum revenue return, and pledging to collaborate on the development of a detailed Congress Budget and Congress Services Agreement according to a template provided by the CAP.
5. The proposed Congress Budget and Registration Fee schedule shall be subject to approval by the CAP Council; the Congress Services Agreement shall be completed and signed by both parties no later than 7 months prior to the starting date of the Congress.



## APPENDIX F TO THE CAP'S CONGRESS PLANNING KIT DATED SEPT. 10, 2010

### Memorandum of Understanding

**Between: (Host Department, University)**

**and**

**The Canadian Association of Physicists**

**Re: Hosting of the CAP Annual Congress (year)**

This document summarizes the agreement between the (Host Department, University) and the Canadian Association of Physicists to collaborate on financial and logistical planning and coordination of the CAP annual Congress (year).

The (Host Department, University) agrees that:

- It has reviewed, understands, and will make every effort to comply with CAP's documentation, policies and procedures in order to ensure the successful hosting of the CAP annual Congress, including
  - CAP's Congress Planning Kit
  - CAP's Policy on Minimum Congress Revenue Return
  - CAP's Policy on Recognition and Reward of Congress Hosting Departments;
- It will establish a Local Organizing Committee (LOC), co-chaired by (names of co-Chairs, to be in place at the time of signing this MOU), to be responsible for overseeing all local arrangements, including local fund raising efforts and monitoring the LOC-related aspects of the budget;
- It is responsible for providing a realistic initial draft budget, according to the template provided by the CAP, on the basis of which CAP Council will decide whether or not to approve this Congress Bid
- It will collaborate, via its LOC, with the CAP's Congress Advisory Committee (CAC) to develop a final Congress Budget that is acceptable to all parties and which will accompany a complete, signed copy of the CAP's Congress Services Agreement, to be approved by the CAC, no less than 4 (preferably 6) months prior to the start of Congress.

The CAP agrees that:

- It will provide logistical support and advice to the (Host University) LOC via the CAP's Executive Director and Congress Advisory Committee, in order to ensure a financially successful and well-run congress. As part of this support, the CAP will conduct a site visit to meet with the LOC and assess the local situation approximately 2.5 years in advance of the Congress date;

- It will review the initial draft budget that accompanies the Congress Hosting Bid and will develop an appropriate registration fee schedule, to be approved by CAP Council at the Fall meeting prior to Congress, that will facilitate meeting the Congress revenue goals, in light of the current status of the Congress Averaging Fund.
- It will work with the LOC to establish and approve specific Congress dates no less than 18 months in advance of the Congress;
- It will work with the LOC to develop a final Congress Budget that is acceptable to all parties and which will accompany a complete, signed copy of the CAP's Congress Services Agreement, to be approved by the CAC, no less than 4 (preferably 6) months prior to the start of Congress;
- It will be responsible for national level fund raising and exhibitor recruitment, as distinct from the LOC's local fund raising and exhibitor recruitment efforts, and it will provide information and assistance to the LOC to help coordinate these local and national activities;
- It will advance sufficient funds to (Host University) to cover expenditures that must be paid locally through the host university

It is to be understood that all parties agree to work together on a best effort basis to ensure the success of the CAP annual congress (year).

---

### Signatures

The following representatives are authorized to sign on behalf of the CAP and the host university. By his/her signature, each representative indicates that he/she has read and understood this Memorandum of Understanding, as well as the CAP Congress Planning Kit, including the appended policy documents and guidelines, and that he/she agrees, on behalf of the association/institution, to uphold the agreement specified herein.

For the host university: (specify name of university here)

\_\_\_\_\_  
**Name: (Head or Chair of Dept.)**

\_\_\_\_\_  
**Date**

For the Canadian Association of Physicists:

\_\_\_\_\_  
**Francine M. Ford, Executive Director**

\_\_\_\_\_  
**Date**

# APPENDIX G TO THE CAP PLANNING KIT DATED SEPT. 10, 2010

## **Congress Services Agreement**

between

**The Canadian Association of Physicists**

and

(host institution)

**For hosting the CAP Annual Congress**

at: (University)

on: (dates)



The Canadian Association of Physicists  
Suite 112, MacDonald Building  
University of Ottawa  
150 Louis Pasteur Priv.  
Ottawa, Ontario, Canada  
K1N 6N5

**Preamble:**

The Annual Congress of the Canadian Association of Physicists (CAP) is the most important general physics conference in Canada. Each year, hundreds of physicists from Canadian universities, research laboratories, and industry meet at the host university to communicate the results of their research; to learn about the latest developments across a broad spectrum of physics subdisciplines, as presented by colleagues, students, and distinguished plenary and invited speakers; to keep abreast of developments in matters of Canadian science policy, research funding, and physics education; to connect with the broader community of Canadian physicists; and to conduct the affairs of the Association through its Annual General Meeting and meetings of Council and other groups.

While hosting a Congress represents a significant commitment for the members of the host institution, a successful Congress also conveys important benefits for the host department, its students, and the institution. The planning and execution of the annual Congress also represents a very significant commitment of the CAP, which works in close collaboration with the host institution to ensure a successful outcome. This involves the association's input at various levels – from the Program Committee, chaired by the CAP's Vice-President and staffed by the Chairs of CAP's specialized subject Divisions -- to the Congress Advisory Committee, chaired by the Past President -- to the National Fund Raising Committee. The annual Congress also represents an enormous commitment of time and effort by the CAP Office staff, who provide essential support ranging from assistance with budget and event planning and logistics, to liaison over membership issues, to publication of the Congress program, to recruiting of national sponsors and exhibitors, to development and distribution of Congress advertising materials through CAP's email lists and the association's web site.

The importance and costs of the effort expended on the annual CAP Congress by the association and its staff are appropriately reflected in the CAP's annual operating budget. As a fraction of total income, Congress revenue is second only to membership fees in its contribution to the financial well-being of the association. Unlike the basic membership income, which is relatively stable, Congress revenues can fluctuate significantly from year to year depending on such factors as the size and location of the host institution, the success of national and local fund raising campaigns, and the fees levied for provision of the necessary conference services. Based on historical revenue returns and the needs of the association, CAP policy specifies an appropriately adjusted minimum revenue return to the association, which is built into the Congress planning and association budgets. This revenue return is used to partially offset the salary costs of dedicated CAP Office staff for the time spent directly working on Congress preparations, as well as to cover the direct costs of Congress that are incurred by the CAP office. The year to year variability in the revenue return to the association is buffered by the CAP's Congress Averaging Fund.

While it is expected that each host department / Local Organizing Committee will practice appropriate and sound financial management and will make every effort to return the maximum possible revenue to the association, it must be recognized that the CAP bears full financial responsibility in the event that the minimum revenue return is not met. The significance of the potential financial impact on the association therefore necessitates a close and effective collaboration between the CAP and the host department. This Congress Services Agreement is the final stage in a series of negotiations and formal approvals granted by the CAP to the host institution. It follows the acceptance of a formal Congress hosting bid by the CAP Council approximately 2 years in advance of the proposed Congress, with a signed MOU, and a lengthy period of discussions and consultations between the CAP and representatives of the host department, its Local Organizing Committee, and the CAP's Congress Advisory Committee. This agreement necessarily focuses on the service and budgetary aspects of the Congress implementation; detailed guidelines and advice on Congress planning for Local Organizing Committees are found in the CAP's Congress Hosting Kit.

## Services Agreement and Budget:

As an essential element of its Congress planning and management strategy, the CAP has developed this document as a template for Service Agreements between the CAP and institutions which host the annual Congress. This document lists all services to be provided by the host institution or designate (e.g. a firm engaged by the host institution to perform these services) in support of the specified annual Congress. It further specifies all fees for services that are to be charged to the Congress budget. It is to be understood that, at the time of finalizing this services agreement, the Congress registration fees and a preliminary Congress budget will have been reviewed by the CAP's Congress Advisory Committee and by the CAP Executive, and that these items will have been formally approved by the CAP Council at its annual fall meeting. Therefore, the approved registration fee schedule and preliminary budget are to be appended, and must be referred to in finalizing the details of this agreement, including the adoption of a formal Congress Budget.

In formulating the detailed Congress Budget, CAP's policy on *Recognition and Reward of Congress Hosting Departments*<sup>1</sup> must be taken into account. The policy is reproduced below for reference. If a department chooses to opt out of the honorarium provision described in this policy, it must indicate so at the time of signing this agreement.

### **Recognition and Reward of Congress Hosting Departments**

To recognize and reward the work done by the Local Organizing Committee (LOC) to contribute to revenues of the annual CAP Congress, it is resolved that the CAP shall award the host university's Physics Department an honorarium equivalent to 20% on all sponsorship from local sources<sup>2</sup> and on all income from exhibitors recruited by the LOC who have not previously exhibited at a CAP Congress.

Such money is to be used by the host department for initiatives promoting physics and/or physics teaching. The name of the CAP should be associated with each of these initiatives. The honorarium will be presented to the LOC Chair at the Congress banquet, at which time the LOC Chair will be invited to outline plans for how the honorarium will be spent.

### **National Congress Fund Raising Committee**

To complement the work done by the LOC to raise funds locally in support of the annual CAP congress, the CAP shall establish a National Congress Fund Raising Committee. This committee shall consist of the CAP President, Past President, Executive Director, Secretary-Treasurer, Director of Corporate Members, and a representative member of the Science Policy Committee. This committee shall be responsible for fund raising at the national level, including NSERC and other government sources, CAP's Corporate Members, and other regular sponsors and exhibitors who attend Congress from year to year.

As detailed in the next section, it is to be understood that the host department / institution is responsible for management of the Congress Budget, including accounting services, regular reporting to the CAP Office, and preparation of a final financial statement by Aug. 31 of the congress year. Should the CAP have advanced funds to the host institution for congress expenses, a full accounting of all expenses processed through that account shall be submitted to the CAP within one month of the congress, and any remaining balance of that account shall be returned to the CAP.

<sup>1</sup> Approved by CAP Council, Oct. 4, 2008

<sup>2</sup> "Sponsorship from local sources" refers to sponsors that are not on the list of institutions or firms to be contacted "at the national level", i.e. by members of the CAP National Congress Fund Raising Committee.

## Services:

The host institution agrees to provide the services listed below in support of the CAP's annual Congress. It is understood that these services will be provided in both official languages – English and French – regardless of the Congress location. It is understood that some services will be provided at the institutional level, while others will be provided by the host department within the institution.

Basic services which do not incur a direct cost to the Congress budget (e.g. `make arrangements for parking to be available`) are to be included in the Institutional Service Fee. Direct costs (e.g. `rental of lecture hall for the Herzberg Memorial Public Lecture`) are to appear **either** as line items in the approved Congress Budget, **or** they may be indicated as being provided without charge by the host institution.

Items for which direct costs **may** be anticipated are indicated with an asterisk (\*) in the table below. For each potential direct cost budget item, use the check box provided to indicate its budget status, and verify that the appropriate amount has been entered in the Congress budget sheet if necessary.

Service & Cost	Details
<b>Congress web site</b>	<ul style="list-style-type: none"> <li>- Create and maintain a local web site for the CAP annual Congress;</li> <li>- Liaise with the CAP Office to link and post specific items and online forms as required.</li> </ul>
<b>* Online Registration System</b>  <input type="checkbox"/> Direct cost in budget <b>or</b> <input type="checkbox"/> Provided without charge	<p>* Develop and implement an on-line system to accept registration, accommodation and special event bookings and payments by cheque and credit card, consistent with the registration fee schedule as approved by CAP. The system must produce appropriate name tags, registration receipts, and a delegate list that can be sorted by membership status, attendance category, and institution.</p> <ul style="list-style-type: none"> <li>- Liaise with the CAP Office to verify membership status of individual applicants, and to track and confirm registration and banquet fee waivers etc.</li> </ul>
<b>Accounting</b>	<ul style="list-style-type: none"> <li>- Establish an exclusive university conference account for host-university related congress expenses. Work with the Congress treasurer and the CAP Executive Director to process and monitor all Congress revenues and expenses handled locally.<sup>3</sup></li> <li>- Track all Congress revenue and expenditure transactions handled locally, prepare regular financial reports against the approved budget, and submit reports to the CAP office as requested. The final statement must be prepared within 10 weeks of the end of the congress.</li> <li>- Establish the process necessary for the acceptance of Visa and Mastercard registrations and other payments to the Congress. Credit card processing fees are to be shown as a separate line item in the Congress budget.</li> <li>- Ensure that all aspects of collecting and submitting the GST/HST are taken care of; tax credits applicable to expenses paid through the Congress budget are to be credited back to the Congress account.</li> </ul>

<sup>3</sup> Prior to setting up this account, the university will be required to sign this Agreement for Congress Services and to submit a revised Congress budget to be approved by the CAP Congress Advisory Committee and Council. This budget will define all acceptable Congress expenses. Once approved, this budget will form the basis for all subsequent Congress financial reporting. Any additional expenses may only be incurred with the direct knowledge and approval of the CAP.

<b>Accommodation</b>			<ul style="list-style-type: none"> <li>- Secure an adequate amount of inexpensive on-campus accommodation with a variety of room options. Parking and breakfast should be provided.</li> <li>- Negotiate contracts with several local hotels to provide rooms to Congress delegates, allowing for a range of prices and amenities to be provided.</li> <li>- Contracts must be submitted to the CAP Office for review and signature.</li> </ul>
<b>Session / Meeting Rooms, Audio Visual &amp; Other</b>			<ul style="list-style-type: none"> <li>* Secure appropriately sized rooms and audio-visual (AV) equipment required for the public, plenary, and contributed oral sessions at Congress, and the High School Teachers' Workshop, based on program requirements as specified by the CAP office.</li> <li>- Ensure that each session room is provided with a trained volunteer capable of troubleshooting the AV systems during the sessions.</li> <li>* Secure adequate space and display boards for the contributed poster session, based on program requirements as specified by the CAP office.</li> <li>* Arrange for ancillary meeting rooms with AV capability (as required) upon request by the CAP office, to accommodate various groups which are authorized to hold meetings in conjunction with the CAP Congress.</li> </ul>
<b>* Item</b>	<b>Budget</b>	<b>Provided</b>	
<b>Rooms</b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>AV</b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>boards</b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>other</b>	<input type="checkbox"/>	<input type="checkbox"/>	
(specify)			
<b>Herzberg Memorial Public Lecture</b>			<ul style="list-style-type: none"> <li>* Secure an appropriate public lecture hall, with AV equipment as specified by the CAP office.</li> <li>* Arrange transportation for delegates, if necessary.</li> <li>* Make arrangements to have the lecture videotaped and three copies provided to CAP office.</li> <li>* Arrange a catered reception following the lecture for delegates and special guests only.</li> <li>* Arrange for distribution and collection of entrance tickets, if necessary</li> </ul>
<b>* Item</b>	<b>Budget</b>	<b>Provided</b>	
<b>Room</b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>AV</b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>video</b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>reception</b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>other</b>	<input type="checkbox"/>	<input type="checkbox"/>	
(specify)			
<b>Internet Access</b>			<ul style="list-style-type: none"> <li>* Arrange for (wireless, if possible) internet access to be available to delegates at the Congress location, as well as at the Registration and CAP Desks.</li> <li>- Provide clear written instructions for internet access, to be provided to delegates in a variety of formats as requested by the CAP office.</li> </ul>
<input type="checkbox"/> Direct cost in budget <b>or</b> <input type="checkbox"/> Provided without charge			
<b>Exhibitors and Sponsors</b>			<ul style="list-style-type: none"> <li>- Solicit and secure exhibitors and sponsors from local contacts that are not on the CAP's national list of exhibitors and sponsors.</li> <li>- Post names of all secured exhibitors and sponsors on the Congress website, with logos and links in accordance with CAP policy.</li> <li>* Secure sufficient booths, tables, chairs, internet access, electricity, etc. for each of the exhibitors</li> <li>* Ensure adequate daytime security and overnight secure storage space for exhibits.</li> <li>* Arrange box lunches for exhibitors, if necessary.</li> </ul>
<b>* Item</b>	<b>Budget</b>	<b>Provided</b>	
<b>Booths</b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>security</b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>lunches</b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>other</b>	<input type="checkbox"/>	<input type="checkbox"/>	
(specify)			
<b>Parking</b>			<ul style="list-style-type: none"> <li>- Make arrangements for parking to be available for delegates during the entire Congress, and for ancillary meetings (e.g. Council, Executive) preceding the Congress should these be held on campus.</li> </ul>

<p><b>Registration Desk and Delegate Packages</b></p> <p><input type="checkbox"/> Direct cost in budget  <b>or</b>  <input type="checkbox"/> Provided without charge</p>	<ul style="list-style-type: none"> <li>- Provide and staff an on-site Registration desk with accommodation for pre-registered as well as walk-in delegates.<sup>4</sup></li> <li>* Assemble and provide a registration package to each delegate, to include: printed receipt, name tag and holder containing lunch and special event tickets, tourism materials, and other materials to be specified by the CAP, e.g. program change sheets, restaurant guides, list of sponsors and exhibitors, etc.</li> <li>- Distribute copies of the printed Congress program, supplied by the CAP office, to registered delegates.</li> </ul>												
<p><b>CAP Desk / Office</b></p> <p>* <b>Equipment:</b></p> <p><input type="checkbox"/> Direct cost in budget  <b>or</b>  <input type="checkbox"/> Provided without charge</p>	<ul style="list-style-type: none"> <li>* Provide a separate desk near the registration area for CAP office staff, equipped with internet access, a laser printer, and other items as specified by the CAP office.</li> <li>- Provide access to a secure, locked area near the registration desk for the overnight storage of the CAP and registration desk materials.</li> </ul>												
<p><b>Signage</b></p>	<ul style="list-style-type: none"> <li>- Arrange outdoor and indoor signage as required to ensure that delegates can easily find their way to sessions, accommodation, and special events on campus.</li> <li>- Post session details, incorporating any last minute changes, outside each lecture room prior to the start of each session.</li> </ul>												
<p><b>Publicity</b></p>	<ul style="list-style-type: none"> <li>- Work in cooperation with the CAP office to advertise and promote the Herzberg Memorial Public Lecture as well as any other sessions which are open to the public and/or the university campus at large.</li> <li>- Distribute appropriate promotional materials for the High School Teachers' workshop.</li> </ul>												
<p><b>Meals and refreshments</b></p> <p>* <b>additional banquet costs:</b></p> <table border="1" data-bbox="134 1373 524 1614"> <thead> <tr> <th>* Item</th> <th>Budget</th> <th>Provided</th> </tr> </thead> <tbody> <tr> <td>hall</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>transport</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>other (specify)</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table>	* Item	Budget	Provided	hall	<input type="checkbox"/>	<input type="checkbox"/>	transport	<input type="checkbox"/>	<input type="checkbox"/>	other (specify)	<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> <li>* Arrange coffee breaks, Congress banquet, receptions, Division Meeting lunches, Teacher's Workshop lunch, and any other meals/refreshments requested by the CAP Office.</li> <li>- Congress banquet fee is pre-approved by CAP Council; fee must cover meal and provide ¼ bottle of wine per person at the dinner table; a cash bar should be available beforehand and during the meal.</li> <li>- Arrange transport to Congress banquet if required</li> <li>- Arrange tickets for on-campus lunches to be available for purchase via the online registration system, as requested by the CAP</li> <li>- Meals and coffee breaks provided for Divisional lunches and ancillary meetings must be tracked separately to allow for cost recovery from appropriate sources</li> </ul>
* Item	Budget	Provided											
hall	<input type="checkbox"/>	<input type="checkbox"/>											
transport	<input type="checkbox"/>	<input type="checkbox"/>											
other (specify)	<input type="checkbox"/>	<input type="checkbox"/>											
<p><b>Miscellaneous Direct expenses</b></p>	<ul style="list-style-type: none"> <li>* Other miscellaneous direct expenses incurred on behalf of the Congress that are not specific line items in the budget (e.g. postage, long distance charges, printer rental for Congress hotel etc. ) are to be itemized and charged to the Congress account as they occur. These must be included as part of the financial reporting, with details available upon request.</li> </ul>												

<sup>4</sup> Note that registration for the High School Teachers' Workshop is complimentary and is not part of the Congress registration activity; it is to be handled separately by the workshop organizers, appointed through the Local Organizing Committee.



<p><b>Additional services / Special circumstances</b></p> <p><input type="checkbox"/> Direct cost  <b>or</b>  <input type="checkbox"/> Provided without charge</p>	<p>* Special circumstances may arise during the planning of a particular Congress requiring additional services that are not included in the basic provisions outlined above. In such cases, a separate memo detailing the additional services to be provided and associated costs should be appended to this document.</p>
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**INSTITUTIONAL SERVICE FEE:**

For the provision of services as detailed in this agreement, the CAP agrees to pay [(name of group)], as per attached contract, a fee calculated on the basis of:

**EITHER:**

a)  A fixed amount of (specify) \$ + GST/HST Cdn per registered Congress delegate<sup>5</sup>.  
*(This fee structure is the standard practice and is strongly preferred by the CAP.)*

**OR**

b) Other: (specify: \_\_\_\_\_ )

**Recognition and Reward of Congress Hosting Departments:**

Indicate here whether the host department wishes to accept the honorarium provision for local fund raising activities as specified in the CAP policy stated on page 3 of this form.

honorarium accepted as per CAP policy

**Or**

honorarium declined

### Cancellation Policy

In the unlikely event that the annual Congress has to be cancelled, the CAP will reimburse the host institution for all expenses incurred to the date of cancellation as part of the Congress organization, such as printing, postage, labels, envelopes, etc. which have not already been covered to that date by Congress revenue. Should the CAP have advanced funds to the host institution for congress expenses, a full accounting of all expenses processed through that account shall be submitted to the CAP within one month, and any remaining balance of that account shall be returned to the CAP.

<sup>5</sup> Not including participants in the High School Teachers' Workshop, the CAP Office staff, and student volunteers, whose registration is complimentary.

## Signatures

The following representatives are authorized to sign on behalf of the association and the host university. By his/her signature, each representative indicates that he/she has read and understood this contract including appended materials, and that he/she agrees, on behalf of the association/institution, to uphold the terms and conditions specified herein from the date of signing until such time as the final Congress reporting has been completed and all accounts have been settled.

For the Host Department (University):

\_\_\_\_\_

**Name, Title**

\_\_\_\_\_

**Date**

For the Canadian Association of Physicists:

\_\_\_\_\_

**Francine M. Ford, Executive Director**

\_\_\_\_\_

**Date**

---

## APPENDICES:

- I. Memorandum of Understanding, specifying minimum Congress revenue target
- II. Registration fee schedule, as approved by CAP Council
- III. Preliminary Congress budget, as approved by CAP Council; Congress Advisory Committee Approved Congress Budget ;
- IV. Specification of additional services to be provided under special circumstances, if applicable
- V. Conference Management Services Contract, if applicable

## APPENDIX H TO CAP CONGRESS KIT DATED SEPT. 10, 2010

### Milestone Schedule for Congress Planning – LOC activities:

#### Two or more years before Congress:

- Submission of congress bid to Executive Director; bid will be reviewed by the Congress Advisory Committee and presented to CAP Council for consideration and possible approval.

#### Upon acceptance of the Congress Bid:

- Memorandum of Understanding is signed by the Head/Chair of the host department and the Executive Director of the CAP. **LOC co-chairs must be identified at this time.**
- LOC co-chairs should start recruiting LOC members and assign specific tasks to each member, advising the CAP office of these appointments as they are secured.
- LOC should start working to secure accommodations, session and meeting rooms, banquet and Herzberg venues, internet and audiovisual support, sponsorships and in-kind contributions.
- The CAP Executive Director and, if known, the individual who will be program chair for that congress, will make a site visit to meet with the LOC co-Chairs, meet the appointed LOC members and other faculty/students, review the local facilities, review the planning and budget requirements, and assist with early stages of Congress planning.

#### At least 18 months before the Congress:

- LOC co-chairs ensure that the LOC has been established and as many key tasks as possible have been assigned to members: Treasurer, Secretary, Audio Visual, Exhibits and Poster Session, Student events; Volunteer Coordinator, Herzberg lecture and welcome barbecue coordinator, Signage coordinator, Hospitality / liaison with conference services & banquet coordinator; High School Teachers' Workshop organizers, publicity/media relations, website/local information. The list of names and assigned duties is submitted to the CAP office for posting on the Congress website.
- LOC prepares draft of Congress poster to be included in the program and registration package of the Congress preceding theirs.

#### One year before the Congress:

- Ensure as many LOC members as possible attend the Congress in the year preceding their congress, and attend a meeting with the current LOC, the CAP Executive Director, and the incoming Program Chair to pose questions and discuss issues.
- Identify and engage a local high school teacher to work with LOC on coordination of the High School Teachers' Workshop.
- Work to finalize draft Congress Budget.

### **September before the Congress:**

- Congress Budget should be submitted to the CAP office on or before Sept. 1<sup>st</sup>. The Executive Director will arrange a conference call with the Chairs of the LOC, CAC and Program Committee to review the budget and conference planning to date. Roles and responsibilities of all parties will be reviewed.
- Any revisions to the proposed Congress Budget should be submitted to the CAP Office by Sept. 15<sup>th</sup>. The CAC will review the revised budget and associated registration and banquet fee schedules and should grant approval prior to the fall Council meeting.
- LOC co-chairs prepare a presentation containing basic information about the Congress location and facilities, including maps, accommodation, venues, facilities for exhibitors and various congress sessions and auxiliary meetings, and the proposed Congress Budget and fee schedule. One of the LOC co-chairs attends the fall Program Committee meeting and the fall CAP Council meeting, held on the same weekend in Ottawa (late Sept. or early Oct.) and presents this information on behalf of the LOC.

### **October - December before the Congress:**

- LOC provides the CAP office with local information, including maps and hotel / accommodations arrangements, and final/complete list of LOC members (names and assigned duties) for inclusion in the Congress Web site.
- Planning and booking of spaces, fund raising, securing of exhibitors, coordination of volunteers etc. should start, or continue to be worked on, during this period by the LOC.
- Initiation of a monthly teleconference meeting between the CAC and LOC at a mutually convenient time (these teleconference meetings are escalated to weekly starting in January).

→ Note that during this period, the Program Committee and the CAP Office will be working intensively on the process of inviting speakers, preparing for abstract submission, student competitions, publicity etc. The official call for abstracts should be made in mid-November, via email, the CAP web site, and the Oct-Dec issue of *Physics in Canada*.

### **January – February of the Congress year:**

- Initiation of weekly teleconference meetings in early January between the CAC and LOC to review progress on logistics, budget, fund raising, recruitment of exhibitors etc.
- Preliminary room assignments should be made for the parallel, plenary, and poster sessions, as identified by the Program Committee, bearing in mind that additional sessions may be called for in light of the response to the call for abstracts (close of submissions is generally around March 1<sup>st</sup>.)
- Follow up on invitations for sponsorship and exhibitor participation at Congress should be actively pursued during this period, as well as detailed planning of the Teachers' Workshop and other special events (welcome barbecue, receptions etc.) .

### **March:**

→ Note that this will be a very busy month for the Program Committee and the CAP Office, as the congress program will be assembled during this period. Weekly meetings between the LOC and the CAC will monitor progress and plans for room assignments, accommodation of exhibitors, and special

events. The congress registration system is also developed during this period, in cooperation with the LOC, with the intent of making it live just as the program schedule is made available.

- LOC provides list of session rooms, capacities, and building plans showing room layout to Program Chair and CAP office; room assignments should be finalized during this period.

#### **April:**

- LOC provides detailed input including maps, room layout, description of facilities, location and times for registration desk, exhibit area, as well as AV instructions etc., for front end of congress program.
- By the end of April, arrangements for coffee breaks, catering of dinners and special meetings, etc. should be well in hand.
- Preparation of materials for Congress registration packages (maps, badges, internet instructions, AV instructions, local restaurant guide etc.) should be well advanced.
- Bilingual indoor and outdoor signage should be prepared, including arrangements to post session details on or near the doors of all parallel and plenary session rooms. As much as possible, these signs should be sturdy and generic in nature so that they can be shipped/forwarded to the next year's LOC for re-use.
- Assemble lists of student volunteers etc.
- Publicize High School Teachers' Workshop and arrange publicity for Herzberg lecture and any other special events.

#### **May:**

- Prepare slide show for Herzberg public lecture to be run before the session starts, introducing the CAP, the Herzberg public lecture, acknowledging exhibitors and sponsors, and showcasing local interest as well as selected Art of Physics winners.
- Plan onsite registration and test the system
- Establish detailed schedule for student volunteers in session rooms
- Confirm availability of all necessary equipment for CAP desk located in or near registration area.

#### **June:**

- Host congress !
- **Host post-conference lunch for LOC and volunteers**

#### **July/August:**

- Finalize finances from Congress and submit LOC report to CAP office for reconciliation and updating to include revenues and expenses received/paid directly by the CAP office.

## APPENDIX I TO CAP'S CONGRESS PLANNING KIT DATED SEPT. 10, 2010

### CAP National Fundraising List for 2011 Congress

Companies contacted by CAP to be an exhibitor, a sponsor, or both:

ABB Bomen
Advanced Applied Physics Solutions (AAPS)
Agilent Technologies (formerly Varian, Inc.)
Andeen-Hagerling Inc.
Atomic Energy of Canada Limited (AECL)
Attocube Systems AG
BOC Edwards
Bruker Ltd.
Bubble Technology Industries (BTI)
Canada Analytical and Process Technologies (CAPT)
Canadian Institute for Photonic Innovation (CIPI)
Canadian Light Source (CLS)
Canberra Co.
CCR Process Products
Channel Systems
Coherent Inc.
Dalsa
Datacomp Electronics
Delta Photonics
E Instruction Corporation
Elcan Optical Technologies
Exfo
Gamble Technologies Limited
Glassman High Voltage
Institute for Quantum Computing (IQC)
Institute of Physics (IoP)
Irwin Publishing Ltd
John Wiley and Sons
Johnsen Ultravac
Kurt J. Lesker Canada Inc.
McGraw Hill
Melles Griot Canada inc.
Merlan Scientific
NanoQuebec
NSERC National Office
NSERC Regional Office (LOC can contact after discussion with Nat'l office)
Nelson Education Ltd
Newport Instruments Canada Corp. (LOC welcome to invite if have personal interaction)
NRC Research Press
OCI Vacuum Engineering
OnX Enterprise Solution

Optech Incorporated
Oxford Instruments
PASCO Canada
Pearson Education Canada
Perimeter Institute for Theroretical Physics
Plasmionique Inc
R & D Pour la défense Canada - Valcartier
Research in Motion
SNOLAB
Springer
Systems for Research
Teachspin Inc.
Thomson Nelson
TomoTherapy
TRIUMF

DRAFT

## **APPENDIX J TO THE CAP'S CONGRESS PLANNING KIT DATED SEPT. 10, 2010**

### **Guidelines for Recognizing LOC Faculty and Student Volunteers**

#### LOC Committee:

The members of the LOC (as listed on the CAP website) are given a banquet ticket.

The members are asked to wear a CAP t-shirt or vest when “working”.

#### Student volunteers:

Each student volunteer is given a CAP t-shirt to wear when they are “on duty”. These are theirs to keep.

Each student volunteer who works more than 10 hours during the CAP Congress is given a free registration to the conference.

For every 10 student volunteers (list of volunteers and proposed schedule must be provided to the CAP office by May 14<sup>th</sup>), the LOC is given one free banquet ticket to allocate to their most valuable volunteers.

The CAP Congress budget covers one “thank you” post-conference lunch (pizza or something like that) for the LOC.

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#### **Duties of room volunteers**

Stand outside room and “eye” congress badges. Do ask one or two who don't have it visible to wear it and show it. (We need to make sure that there are posters or announcements around the registration area and in program pointing this out to delegates – it will be sent in an e-mail broadcast ahead of time as well).

Test the audio-visual equipment at least 15 minutes before the session starts.

Assist with timing the talks.

Make note of each speaker – check off if listed speaker gives talk, note if there is a change of speaker or no speaker attended. Include an estimate of number of participants in session (average overall is fine if there is movement in an out throughout the session). – This needs to be handed in to the main coordinator who will give a full package to the CAP office staff at the end of each day.





## **GUIDELINES FOR THE PROMPTION OF THE CAP HERZBERG MEMORIAL PUBLIC LECTURE**

*Updated Sept. 10, 2010*

The following timetable and promotional guidelines have been developed over the years by Perimeter Institute and successfully attract audiences of 500 or more people per monthly event. The basic minimum requirements for the organization of the lecture tour appear below. Any other promotional initiatives that have been successfully used at the local level for similar events may be added to these items. Please forward an account of additional initiatives to the CAP office so that they may be combined with these suggestions for future year organizers.

### **Timeline**

#### As soon as date is confirmed:

- book large hall
- coordinate free parking

#### As soon as speaker is confirmed:

- update departmental and university websites to include Herzberg Public Lecture and link to Congress website and CAP website

#### Starting in March:

- promote Herzberg Lecture whenever possible at preceding lectures and events (PowerPoint template supplied)

#### Six weeks prior to event (end of April):

- finalize arrangements with host location, including preparation of tickets if required. Update website to include information about how/when tickets can be obtained. Send information to CAP office for publicity poster.

#### Five weeks prior to event (1<sup>st</sup> week of May):

- email details of the event (name, title, abstract, time, location, free parking) to all free “community events” listing editors at local TV, cable & radio stations, daily and weekly newspapers, etc.
- arrange to have 500+ Herzberg lecture posters printed

#### Four weeks prior to event (2<sup>nd</sup> week of May):

- mail dozens of posters to your local media members. Send individual copies to newsroom assignment editors, favourite reporters, radio show D.J.s, etc., - even if sending multiple letters to one location.

- mail a separate batch of posters to all the free community listing service editors (above) that you already have already approached by e-mail
- put up approx. 400 + posters on campus and around town (LOC should develop a distribution plan one month before posting)
- contact your main local newspaper and book space to publish the lecture ad (template supplied) in the first section or entertainment section - the ad to run a week prior to the lecture.

Three weeks prior to event (3<sup>rd</sup> week of May):

- Write an e-mail that invites people to the lecture. Include the lecture title, guest, abstract, location, time, and other info. Send to all your database and contact list names including the media (again), local VIPs, faculty members, student bodies, subscription holders, etc.
- send the same note to other “gate keepers” and communications people around town who have databases of their own and may forward the info to high school teachers, business groups, service clubs, etc.
- LOC / CAP finalize the evening schedule, including guests invited to make a few words, and then prepare a program for distribution at event; the program should include acknowledgement of sponsors !

Two weeks prior to event (last week of May):

- If the speaker has agreed to be interviewed by the media, contact local talk radio stations and offer the speaker as an interview guest one week before his talk. (Interviews to be coordinated via CAP.)

One week prior to event (first week of June):

- email blast your contact lists and databases again with a friendly reminder note that goes on to show the full title, abstract, location, time, etc.
- (by now the newspaper ad should appear and radio interviews are taking place)
- CAP President prepares guest speaker introduction.
- conduct final review and print program schedule to hand out at event to all attendees (a PPT version of the program handed out at the June 5<sup>th</sup> event in BC – with Borealis Quartet involved – can be downloaded from <http://www.cap.ca/wyp/program.ppt> and used as a template for this handout)

Two days prior to event:

- make sure all on-site signage is printed and ready
- confirm that free parking is arranged and gates will be up
- confirm when doors open, that buses (if being used) are scheduled, that catering is in place, that lighting, projection, and filming is in place
- if tickets are issued and it looks close to a full house, make sure that number of on-site tickets available are limited to number of spaces left. Bring a list of pre-registered participants with you so that those pre-registered are allowed access to the event if tickets run out.