

Financial Advice for OSAPS Meeting Hosts

Advance from OSAPS

Several months before the meeting the host should establish send an E-mail to the treasurer of OSAPS¹ requesting a check for \$3000. The request should include payee information. It is best if the host institution can set up a dedicated account for the meeting.

The \$3000 is an advance from OSAPS on anticipated receipts for registration and banquet fees. All advance registration and banquet fees are collected by the APS. All registration and banquet fees collected on-site must be submitted to the APS for deposit in the OSAPS unit account.

In addition to online registration there should be a paper registration form for non-paying registrants. The paper form can be faxed or E-mailed to the APS. The form can also be used for on-site registration².

Income:

Registration Fees (approved at the Executive Committee Meeting, Fall 2013):

- \$50 for members
- \$60 for non-members
- Free for teachers, retirees and all students (graduate and undergraduate).
- For paying registrants there is a \$10 late registration fee.

Note: Although the number of registrants varies from 70 to 170 (usually around 100) the number of paying registrants is usually about 30 (even at the big meetings).

Banquet Fees:

- The banquet fee is typically \$35 with a reduced price of \$15 for students.

Local Support:

Usually support from the host university. Hosts are encouraged to get support from local industry.

Major Expenses:

- Travel for invited speakers.
- The banquet.
- Coffee breaks and refreshments during the poster session
- Facilities fees.
- Lunch for the Executive Committee of OSAPS.

Planning the budget:

- It is expected that most of the expenses should be covered by the registration and banquet fees. The attached spreadsheet shows meeting expenses for the last five years. Typical meeting expenses range from \$5000 - \$9000. Please keep an eye on the net cost of the meeting (line

¹ <http://www.aps.org/units/osaps/governance/officers/index.cfm>

² See example attached at the end of this document

30) = expenses (line 16) – income (line 27), and try to keep this number below \$1000. While it is rare for the OSAPS to recoup all the cost of the meeting from registration and banquet fees, it is desirable to be as close as possible to the break-even point. Please do not hesitate to contact the OSAPS Treasurer if there are any questions.

- The actual cost per diner for the banquet should be commensurate with the regular banquet fee. The student banquets are subsidized by the registration fees.
- Meeting hosts should seek additional support from the host institution and/or local industry. ***This is particularly important if facilities fees are high.***

Ways to keep down costs:

- Facilities fees are often a very expensive part of the meeting. They can be reduced by scheduling the Executive Committee meeting in a department conference room and providing box lunches from a local sandwich store. The Saturday morning sessions can be scheduled in the physics department.
- Speaker travel can be reduced by selecting some local speakers.

Reporting:

After the meeting the meeting hosts should prepare a financial report outlining all income and all expenses. A template is available from the OSAPS Treasurer.

A preliminary version of this report should be submitted to the OSAPS Treasurer as soon as it is completed. If the registration and banquet fees collected by the APS exceed the advance to the meeting host, the meeting host can request an additional check to cover needed expenses. If all of the advance has not been used, OSAPS should be reimbursed.

A final report should be submitted to the OSAPS Executive Committee at the next meeting.

Tax exempt status:

In 1977 the Assistant Treasurer of the national American Physical Society (APS) authorized the use of the following statement: "The Ohio Section of the American Physical Society is an official part of the American Physical Society, a tax-exempt organization with tax identification number 13-1656610. Therefore tax should not be charged in addition to the cost for services rendered."

SAMPLE PRE-REGISTRATION FORM

APS Members can register online: go to www.aps.org/units/osaps/

Last day to accept registration at APS: “Date”

First Name	Middle Initial	Family Name (Last Name)	
Affiliation		APS Membership ID#	
Institution Address			
City	State	Zip	Country
Daytime Phone	Fax	Email	

MEETING FEES Registrations received after “Date” will incur a \$10 late registration fee.

	Up to “Date”	After “Date”
<input type="checkbox"/> APS Member	\$50.00	\$60.00
<input type="checkbox"/> Non-member*	\$60.00	\$70.00
<input type="checkbox"/> High School Teacher / Retired / Student	Free	Free

* Non-members can join APS at the same time they register and save \$10 on the registration fee. All registration forms and membership forms must arrive together and be accompanied by full payment.

Subtotal Registration:

Banquet / Lunch Tickets

(Registration by Friday, “Date” required for the banquet and Saturday lunch.)

Banquet (Friday Evening, “Date”)

<input type="checkbox"/> APS Member / Non-member	\$35.00
<input type="checkbox"/> Students	\$15.00
<input type="checkbox"/>	

Subtotal Banquet:

Method of Payment

If by check, make payable to APS, in U.S. dollars and drawn on a U.S. bank. Purchase orders are not accepted.

Name of card holder	Credit Card Number	Exp. Date	CVV	Signature
AMEX	VISA	Discover	Diner’s Club	MasterCard
				Cardholder Phone #:

Please mail or fax this Pre Registration Form by Friday, “Date”

Don Wise, APS Meetings Department/OSAPS Spring Meeting, One Physics Ellipse, College Park, MD 20740-3844

Fax: (301) 209-3652 with credit card payment only.

TOTAL PAYMENT: