

Fundraising Guidelines for Topical Meetings

(Provide registration and travel support to invited speakers)

A. Government Grants

The OSA Meeting Manager will send a letter to the Chair(s) with instructions on obtaining funds. Due to the requirements of granting agencies, solicitation of grants must be made the summer of the year before the meeting occurs. Late proposals cannot be processed. Grants can and should be solicited to defray the expense of invited speaker registration and travel costs. Funds can also be solicited to satisfy requests for travel support and waived registration fees for students and other participants. As funds are becoming more and more difficult to obtain, it is necessary for Chair(s) to find more sources to provide support.

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

1. The General Chair(s) must contact the granting officers from agencies who might be interested. If the granting officer is interested, discuss and confirm the amount that should be requested in the proposal (hopefully \$10,000 or more).
 - NSF funds can only be used to support students and junior faculty from educational institutions. On occasion, NSF has agreed to provide support to other individuals, such as scientists from struggling economies, but this must be discussed very carefully with the granting officer.
 - Department of Defense funds cannot be used to support federal government employees or people from former communist countries unless approved in advance by the granting officer.
2. Once the amount is confirmed, provide the Meeting Manager with the granting officer's name, address, phone number, email address, the amount agreed on, and any other pertinent information.
3. NSF has tightened up its proposal submittal process. In addition to the above information, provide your curriculum vitae (two pages maximum) and a project summary. This should state the specific reason for the funds, who the recipients will be and why it is important they receive the funds. Stress the educational merits of the meeting and anything new and different about this meeting that sets it apart from other meetings requesting support. Please note this should not

be a reiteration of the scope of the meeting, as it would have already been incorporated into the proposal. Even if NSF is not approached, this information will definitely strengthen any proposal.

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

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

B. Corporate Contributions

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

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

For Corporate Contributions, you should:

1. Contact any company that may have an interest in providing support.
2. Upon receiving a positive response, forward the complete contact information, the amount agreed upon and what action is required to the OSA Meetings Manager. Advise whether OSA is to send a letter of request or an invoice to the contact.

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

- Dollar amount of the contribution
- Purpose of the contribution
- Date check will be mailed to OSA

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

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

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

- Much quicker and easier to receive the funds
- Do not require as much paperwork
- Funds are usually available in time for the meeting, since corporations want the written, verbal and online recognition
- Funds are usually unrestricted

C. Appropriate Usage of Speaker Fees

1. Funds should not be used to support members of a meeting's Program Committee.
 - Committee members are expected to attend their particular meeting using their own funds; available funding should be distributed in a way that does not cause any apparent conflict of interest.
 - Priority is given to invited speakers and other participants who would not normally attend a meeting, especially those whose attendance would lend credence to a new meeting or broaden the scope of an existing one, which would result in the participation of a new audience or interdisciplinary exchange.
2. The use of travel grants should follow the existing OSA Travel Guidelines, including consideration of ticket fare and class.