Guidelines for the Organization and Operation of ICALEPCS Conferences

Preamble

The International Conference on Accelerator and Large Experimental Physics Control Systems (ICALEPCS) is a biennial series of conferences that rotates between the three geographical regions (1) Americas (including North, South and Central Americas), (2) Asia and Oceania and (3) Europe, Russia, Near East and Africa. The Conference is intended to:

- provide a forum for the interchange of ideas and information between control system specialists working on large experimental physics facilities around the world (accelerators, particle detectors, fusion reactors, telescopes, etc.)
- create an archival literature of developments and progress in this rapidly changing discipline
- promote, where practical, standardization in both hardware and software and collaboration between laboratories, institutes, and industry
- serve as a resource for students and early career professionals to develop careers in control systems

The ICALEPCS series of conferences are organized by a set of committees with chairpersons summarized in the table below. Each committee and chair have defined roles and responsibilities explained in more detail below. Committee membership is reconstituted for each new conference with consideration for continuity, renewal of up to 1/3 of the members, and community balance. To facilitate proper organization of the technical program and publication of conference papers, ICALEPCS is a participant in the Joint Accelerator Conference Website (JACoW) collaboration and uses the JACoW tools to organize and manage the program development, communicate with the community, and publish the conference papers and presentations as JACoW proceedings.

Committee	Chair(s)	Function	Selection Method
Conference overall	Conference Chair	Responsible for the overall organization of the upcoming conference.	Conference Chair is named in the successful site selection bid.
Local Organizing Committee (LOC)	LOC chair	Responsible for local arrangements including booking conference venue, audio/visual services, negotiating hotel rates, creating, and balancing budget and providing hospitality.	LOC chair and LOC members are appointed by the Conference Chair.

ICALEPCS Executive Committee (IEC)	IEC Chair	Ensures the continuation of the conference series and handles high level issues outside the ISAC scope.	ISAC Chair is elected by the ISAC and serves as the IEC Chair. The IEC has 5 members (including the chair) described in the IEC subsection below.
International Scientific Advisory Committee (ISAC)	ISAC Chair Program Chair	Advises Conference Chair regarding conference organization and develops the scientific/technical program.	ISAC membership is proposed by the upcoming Conference Chair and confirmed by the previous conference IEC. ISAC Chair is elected by the ISAC and serves as the IEC chair. Program Chair is nominated by the Conference Chair and approved by the IEC.
Site Selection Committee (SSC)	SSC chair	Ensures one or more proposals are submitted for consideration for the next conference in their region (4 years ahead).	The SSC includes all ISAC members from the selection region. The senior IEC member from the selection region serves as the SSC chair.

1. The ICALEPCS Conference Chair and the Local Organizing Committee

The ICALEPCS Conference Chair is appointed by the host institution prior to its bid and confirmed by the International Scientific Advisory Committee (ISAC) when approving the site selection. The Chair is responsible for all aspects of the upcoming conference, including selection of the Program Chair (PC), LOC Chair and LOC members. The Conference Chair seeks advice from and reports to the ISAC in the execution of their responsibilities.

The Conference Chair appoints a Local Organizing Committee to deal with all local arrangements, including but not limited to conference venue selection, conference financial management, conference organization, social program, facility tours, poster stands, audio-visual equipment and refreshments. Issues can be referred to the ISAC for advice, and the ISAC is entitled to monitor the progress of this committee. The Conference Chair may also appoint a co-chair to be approved by the ISAC.

The Conference Chair will organize two in person meetings of the ISAC for conference planning and program development and one in person meeting at the conference for site selection 4 years hence and any other pending business. Virtual meetings may be held as needed to prepare for the in-person meetings and work on planning, program development or issues that arise.

The LOC is responsible to develop a conference budget ensuring conference income is available to cover all conference expenses. A registration fee is collected to partially cover conference

expenses. Other sources of income include paid sponsorships and industrial exhibits. If an ICALEPCS conference has money left over from conference income after settling all expenses, this money shall be transferred to the next ICALEPCS.

2. The International Scientific Advisory Committee (ISAC)

The ICALEPCS series is overseen by an International Scientific Advisory Committee (ISAC) and provides continuity in the conference series. The ISAC is made up of around 40 active control system specialists appointed from different experimental physics facilities around the world, representing to the extent possible a wide range of relevant disciplines (hardware, software, processes, project management, etc.), experimental areas (accelerators, telescopes, fusion, detectors, etc.), laboratories and geographic areas. Membership should include a diverse set of experienced professionals but also seek to include some members to develop for future leadership roles. The Conference Chair proposes the ISAC membership for approval by the IEC of the previous conference. Once the ISAC membership is approved, the Conference Chair sends invitations to each member and proposes replacements for any invitee who declines the position.

Once the new ISAC has been constituted, it elects its own chair (the ISAC Chair) by e-mail ballot. This election should be initiated and overseen by the Conference Chair as soon as the ISAC membership has been approved and members have accepted. The ISAC Chair can serve for three terms (six years). The ISAC Chair also serves as the IEC Chair.

- E-mail votes require 50% + 1 of ballots submitted by a specified deadline to succeed.
- Modifications to these Guidelines require a "yes" votes from 60% of the current ISAC membership to succeed.
- The voting procedure for site selection is specified in the site selection Procedure (Appendix A).

The ISAC responsibilities include:

- Advising the ICALEPCS Conference Chair when and as requested regarding organizational matters
- Reviewing proposals submitted by the SSC chair and voting on the selection of the conference site 4 years hence (this vote occurs during the ISAC meeting held during the conference).
- Voting on approval of any proposed modifications to these Guidelines
- Reviewing and voting on award nominations
- Development of the conference program led by the Program Chair
- Proposing keynote speakers
- Other responsibilities as requested by the Conference Chair

By April 30 of the year following each conference, a new ISAC is appointed by the next Conference Chair with advice from the outgoing IEC. Appointments to the new ISAC are approved by the IEC of the previous conference and consider both the need for continuity, diversity and for some degree of renewal. It is assumed that new appointees will first receive appropriate approval from their laboratory management for the time and travel commitment

needed to meaningfully perform committee duties. New members will be selected with due consideration to maintaining the geographic and disciplinary balance as noted above.

The Conference Chair appoints a Program Chair, who is an experienced member of the ISAC and must be a different individual. It is recommended that the Program Chair is from the host institute and if this is not possible then from the hosting region. The Program Chair should be selected and presented in the proposal for site selection.

- If an ICALEPCS conference has money left over from conference income after settling all expenses, all or part of this money shall be transferred to the next ICALEPCS.
- A registration fee is collected to partially cover conference expenses. Other sources of income include paid sponsorships and industrial exhibits. The LOC is responsible to develop a conference budget setting the registration fee to ensure the conference costs are covered by the conference income.

During the early Conference program preparation phase, which concludes with the first ISAC meeting, a list of subject areas (tracks) to be emphasized at the conference is defined along with two chairpersons (from the ISAC) for each track. The track chairs, who are experts in the assigned track area, have considerable responsibility for the detailed organization of their sessions and are also expected to serve as session co-chairs at the conference. The track chairs, selected from the ISAC members, work with the Program Chair to define the program. The track chairs with advice from the ISAC can consult with subject matter experts from the community to help define the program when their expertise is considered necessary for success. These additional experts do not become ISAC members. The Program Chair then develops the detailed program and ensures the program is correct in JACoW. All members of the ISAC shall have access to the program planning process and abstracts. An in-person meeting of the ISAC will be convened after the abstract submission deadline to determine the final program details. The abstract submission and program development process will be managed using the tools provided by JACoW.

3. The ICALEPCS Executive Committee (IEC)

Many necessary ICALEPCS-related activities do not require direct involvement of the entire ISAC. For this reason, ICALEPCS has a small executive committee (IEC) charged with ongoing activities related to the conference *series*, rather than preparation of a specific conference. Their responsibilities can be discharged by e-mail.

The IEC is a standing subcommittee constituted as follows:

- ISAC Chair: Elected by the current ISAC and serves as the IEC Chair
- Conference Chair: Current Conference Chair ex-officio
- Member: Previous Conference Chair ex-officio
- Member: Next Conference Chair ex-officio
- Member: of both the current and previous ISAC, appointed by the IEC Chair

An IEC member who is unwilling or becomes unable to serve can be replaced by another person from the same region by appointment of the IEC Chair.

The new IEC membership is announced and takes effect as soon as the new ISAC chair is elected and has selected the appointed member. The previous IEC continues in office until that time.

The make-up of this committee assures both continuity and regional representation. The ISAC Chair also chairs the IEC, assuring that its specified responsibilities and any other issues are dealt with in a timely fashion. Normally, this can be accomplished using e-mail or virtual meetings.

The IEC has four principal responsibilities, carried out on behalf of the ISAC:

- Site Selection: The IEC is responsible for overseeing the ICALEPCS site selection process detailed in Section 4.
- Membership: The IEC is responsible for confirming the new ISAC members proposed by the current conference chair.
- Awards: The IEC administers award programs, which currently include the ICALEPCS Lifetime Achievement, Leadership in Mentoring and Early Career Awards, approved by the ISAC.
- Special Issues: If in its opinion the fundamental objectives and/or the continuity of the conference series are deemed to be endangered, the IEC is empowered to propose solutions and/or to actively intervene. For example, if a chairperson or other critical organizer becomes unavailable after committing to the role, the IEC will appoint a replacement.

4. Site Selection Committee (SSC)

During each conference the ISAC meets to confirm (if there is only one candidate) or select (if there are more) the site for the conference to be held four years later. The selection is announced during the closing session of the conference, by the Conference Chair for the newly selected conference.

The Site Selection Committee is a subset of the ISAC consisting of the ISAC members from the region to be selected (i.e. from the region of the most recently completed ICALEPCS Conference) and is responsible for assuring that at least one qualified bid (and preferably more) is received for presentation to the ISAC for consideration at the next conference. The chair of this subcommittee is the IEC member from this region (past conference chair). The site selection procedure and timeline are outlined in Appendix A. In case no site is proposed for selection and/or the ISAC decides none of the proposed sites are suitable for ICALEPCS, it is up to the IEC to find a solution in the same or a different region.

5. Meetings

The ISAC will meet in-person three times during the two-year cycle. The first meeting should occur more than 1 year before the upcoming conference.
   o This meeting will review the work of the LOC concerning conference logistics and select tracks, track chairs, and write track descriptions in preparation for abstract submission.
   o The second meeting will occur at the latest two months after the abstract submission deadline has closed and will focus on creating the detailed program for the conference.

Review of all submitted abstracts should occur prior to this meeting to ensure each submission is appropriate for the conference and adheres to JACoW quality requirements. These reviews are conducted by the track chairs for their respective tracks. The track chairs also prepare a list of abstracts they propose to move to another track so these trades can be resolved in preparation for selection of oral presentations.
  o The third meeting will occur at the conference and will include presentations of the site selection proposals followed by voting.

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6. Conference Program

The ICALEPCS program is composed of a multiple of elements to provide a variety of opportunities for technical exchanges, both formal and informal along with a few social elements to enhance the conference experience and foster professional networking. These elements typically include:

- Preconference workshops are usually organised on the weekend before the conference begins. These workshops are proposed and selected by the ISAC and each workshop is planned by a chairperson who will supply a link to a webpage with detailed information about the workshop, organize the agenda for the workshop and lead the workshop. The LOC handles workshop logistics by providing meeting rooms, audio/visual services, and refreshments. An additional fee is added to the conference registration for workshop attendees to cover the workshop costs. The workshops are advertised on the conference website along with other program elements
- Opening reception on the evening before the conference along with delegate registration.
- Oral contributions are presented during multiple sessions the week of the conference (Monday – Friday). Oral presentations may be organized in parallel sessions if it is determined there are enough high-quality abstracts to justify this.
- Opening ceremony first morning, which kicks off the start of the conference and often includes some elements of local culture.
- Poster contributions are presented during two sessions not to conflict with oral sessions. Poster judges (from the ISAC and/or LOC) vote to select the best poster from each session.
- Vendors may purchase booths staffed by company representatives to showcase control system products and services which may be useful to participants in their work. These industrial exhibitions are held Monday through Thursday and placed close to the posters and refreshment stations to encourage interaction between delegates and vendors.
- A gala dinner is held one evening during the week (usually Wednesday or Thursday) and often includes elements of local culture and entertainment. The ICALEPCS awards are presented during this dinner.
- It is traditional for the conference to host a dinner for the ISAC one evening during the conference to thank them for their work on the conference.
- There is closing ceremony Friday at the conclusion of talks which includes presenting summaries of the workshops, presentation of poster awards, thanking the organizers and announcement of the location and host of the selected site for the conference to be held in 4 years' time.
- Morning and afternoon refreshments are provided during session breaks and typically include tea, coffee, and light snacks.

- The Conference organisers are strongly encouraged to adopt environmentally friendly practices to reduce the environmental impact of the conference e.g. limit use of paper, electricity, food wastage etc.
- The option of hybrid participation for people listening/viewing talks is left up to the LOC but is not recommended for speakers.
- ICALEPCS fosters a collaborative community for the exchange of scientific knowledge. Oral presentations and posters are selected to highlight research findings and stimulate discussion and not to address institutes' hiring needs. To uphold this environment, presenters should refrain from direct recruitment appeals within their oral or poster presentations and exhibitors' booths should not be used for recruitment purposes.

7. JACoW Proceedings Guidelines

The ICALEPCS series publishes its papers, posters and slides as JACoW proceedings. The hosting institute represented by the Conference Chair and LOC are responsible for providing the necessary support. The JaCOW support represents a significant cost and must be included in the budget proposal included in the site bid. JACoW support includes at least the following duties:

- Appoint a Conference Editor from the host institute, to oversee the configuration of the database to the conference's requirements for abstract submission, selection, session allocations, and for coordination of the editing process and the final proceedings production.
- The Conference Editor must assist as editor to at least one JACoW conference before ICALEPCS to learn the editing process and attend at least one JACoW conference after ICALEPCS as an editor.
- Invite sufficient trained editors from previous and future ICALEPCS conferences, the region and other conferences to ensure all abstracts can be processed during the conference. An editor can process roughly 50 abstracts during the week of the conference.
- Finance the travel, board, lodging and provide a stipend for all external editors assisting at the ICALEPCS conference.
- Provide adequate logistics and support for the editors before and during the conference to carry out the editing in the best conditions including computers and printers as specified by the Conference Editor. Editing starts two days before the conference starts.
- Ensure that the conference proceedings are published in JACoW within 2 months of the end of the conference.

Appendix A – Site Selection Process

1. An ex-officio site selection committee (SSC) is made up of the ISAC members from the region of the most recently completed conference. The task of this committee is to assure at least one qualified bid (and preferably more) for the next conference in the same region (six years from the most recent conference) is received for presentation to the ISAC at the next conference (four years before the conference under discussion). The work of this committee can be carried out by e-mail.

2. At the first ISAC meeting following an ICALEPCS Conference, an SSC chairperson is appointed by the ISAC Chair.

3. Approximately eight months before the upcoming conference, the SSC shall issue a formal call for candidate hosts to regional ISAC members and any other potential hosts. (Any amount of prior discussion, lobbying and/or arm twisting is authorized/encouraged before that date.)

   a. Proposals should include as a minimum:
      i. A letter of support from the host institute's Management
      ii. Demonstration of experience in hosting similar conferences
      iii. Description of the technical/scientific activities of the proposed host institute iv. A preliminary plan and budget, including a list of potential sponsors
   b. Proposals should also comment upon:
      i. International transportation and connections to the proposed conference site
      ii. Accommodation facilities (hotels, guest houses, etc)
      iii. The proposed conference facility itself (facilities, equipment, rooms for poster sessions, industrial exhibit, side meetings, network connections, etc.) iv. Regional opportunities for social/cultural activities and companions

4. The deadline for submission of site proposals should be three months before the next conference. The SSC then screens the proposals to assure that minimum qualifications for hosting are met. Consideration will be given to:

   a. Technical interest of the host institution
   b. Management support and conference experience
   c. Budget proposal
   d. Program proposal
   e. Planning
   f. Any other ideas

5. Qualified candidates will be presented to the ISAC at a meeting to be held during the ICALEPCS conference. The SSC may or may not choose to make a recommendation on the selection. It will give reasons if a recommendation is made. The ISAC will then

approve (if there is only one) or select (if there are more) the winning site by majority vote as follows:

a. Voting is done by ISAC members present at the meeting (no substitutes or proxies)
b. Voting is by secret ballot
c. The chairperson votes only to break a tie
d. 50% + 1 of those voting is required for selection – abstentions are not counted
e. If no proposal receives 50% + 1 votes, the site with the lowest number of votes is dropped from the ballot, and the voting continues