

POLICY ON OEOSC TRAINING ACTIVITIES

January 21, 2008

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Introduction

An objective of the Optics and Electro-Optics Standards Council (OEOSC) is to establish, maintain, and advance optics and electro-optics documentary standards. Training activities that serve to promote this objective are mutually beneficial to both the optics community and OEOSC. Therefore, OEOSC members are encouraged to create and offer training classes on the use of published optics and electro-optics documentary standards, hereafter referred to as “standards.” This document serves as a guideline for matters relating to OEOSC training activities. These activities include the development of new classes and the presentation of OEOSC-endorsed class materials. These guidelines address class development, fee structure, instructor qualifications, instructor reimbursement, and class materials. These guidelines are necessary as the American National Standards Institute (ANSI) and International Standards Organization (ISO) will only license the copyright of their material to OEOSC. OEOSC in turn licenses the material to instructors who meet the requirements outlined in this document.

New and Revised Classes

The OEOSC Board of Directors (Board) encourages OEOSC members to develop training classes for the optics community to promote the use of standards. All class material shall be relevant to existing or future National and/or International optics and electro-optics documentary standards. Members who wish to receive OEOSC endorsement and access to ANSI/ISO material for their training classes must fill out the appended OEOSC New Class Application Form and submit it to the Board for approval. This information must be presented to the OEOSC Board for consideration, prior to any agreement regarding royalty, sponsorship or copyright. In addition, the Board must review all proposed classes in their final form. This review will take place in the form of a presentation at a Board meeting. All detailed class viewgraphs and handout materials must be provided to the Board at least two weeks in advance of a Board meeting for review prior to the presentation. Once new class material has been approved, [a standard this document shall serve as a](#) licensing agreement between the author and OEOSC [shall address the specifics related with respect](#) to royalties, sponsorship and/or copyright issues.

[When a class is revised by the author, a new version of the class shall be provided to the Executive Director of OEOSC, who may, at his sole discretion, require the class be re-affirmed by the board as if it were a new class.](#)

Instructor Qualifications

Members of OEOSC are considered qualified to present a class if:

1. They attended as auditors/assistants two or more presentations of the class by other instructors, or are originators of the material, and
2. They are approved by the OEOSC Board.

A list of qualified instructors is maintained by the OEOSC Executive Secretary.

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Instructor Compensation

There are two methods for compensating instructors and developers of OEOSC-endorsed classes. First, ~~instructors~~ course developers may receive royalties from OEOSC for the use of original material that they develop for an OEOSC-endorsed class. Second, instructors may receive an honorarium for presenting an OEOSC-endorsed class at related to a conference or at an OEOSC member's site.

Royalties

In the interests of encouraging more classes to be created and presented, OEOSC agrees to pay royalties for OEOSC-endorsed class material to the author(s) of the material. Royalty payments shall be \$500 for full-day classes, \$250 for half-day classes, and \$125 for 2-hour classes. In addition, OEOSC will secure any and all other necessary royalties from ANSI or other copyright holders. An author may choose to waive his/her royalties.

Honoraria

It is recognized that being an OEOSC-endorsed instructor may entail a significant commitment above and beyond that required to be a member of OEOSC, such as using vacation time or unpaid time off in order to present a class. Therefore, when a class is scheduled by OEOSC, instructors, ~~who are not compensated by their own companies~~, are entitled to receive an honorarium from OEOSC equivalent to the SPIE honorarium for a class of similar length. However, should the instructor's employer agree to pay the costs associated with the instructor's time away from home, the compensation will be credited to the employer's following year's OEOSC membership fee. Honorarium credit cannot exceed a single year's membership fee. Finally, individuals in all other categories who choose to waive their honorarium may apply it towards their following year's membership fee.

Instructor ANSI and ISO License Fees

~~Instructors are~~ OEOSC is responsible for royalty or license fees ~~they may incur while presenting associated with~~ OEOSC-endorsed materials. These royalty fees include fees to ANSI and/or ISO for use of ANSI/ISO material and to the original author of the class material, if the instructor is not the original author. ~~If an instructor chooses to waive his/her honorarium, then OEOSC assumes financial responsibility for royalty fees. If an instructor chooses not to waive his/her honorarium, the appropriate royalty fees will be subtracted from the honorarium.~~

Class Fee Structure

OEOSC is responsible for all negotiations regarding training class fees and instructor compensation.

Arrangements with Professional Societies

OEOSC has negotiated specific fee structures for training classes held in conjunction with the ~~Optical Society of America (OSA) and/or~~ Society of Photo-Optical Instrumentation Engineers (SPIE) conferences as part of ~~these that~~ organizations' short course programs. OEOSC is responsible for providing an instructor and shall offer the instructor an honorarium equivalent to the host organization's as well as reimburse the instructor for appropriate travel costs, consistent with the travel policies of the host

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organization. The guidelines for offering and accepting honoraria are given in the Instructor Compensation section.

When a SPIE member company contracts with SPIE to present a training class in-house, SPIE shall pay OEOSC \$31,000, plus expenses related to the purchase of copies of the standards to be used in the class. OEOSC in turn SPIE shall pay the OEOSC-appointed instructor an honorarium plus travel expenses per the SPIE's Instructor Compensation guidelines.

Arrangements with Individual Companies

OEOSC members who employ or contract with an instructor who fulfills the OEOSC Instructor Qualifications (see above) may present the class at their employer's site for a flat fee payable to OEOSC of \$920 per class, with an attendee limit of 30 per session; or \$100 per attendee for nine or fewer attendees. If the OEOSC member has contracted with a qualified instructor, that instructor will be compensated by the OEOSC member separately.

OEOSC-endorsed in-person classes shall be offered to individual companies for \$4,500 per half-day class, or \$6,500 per full-day class, with an attendee limit of 30 per session, plus instructor plane fare, rental car, hotel, meal and other normal and reasonable expenses. OEOSC will provide handouts for all attendees, and offer the instructor an honorarium per the Instructor Compensation guidelines. Additional in-person classes taught in sequence with the first shall each be discounted by \$1,500. Classes offered virtually (using Zoom or similar video-conferencing service) shall be discounted by \$1,500. For virtual classes the customer is responsible for generating their own handouts, if any.

Exceptions for Authors' of Original Material

Authors of original OEOSC-endorsed training class material may offer the classes to negotiate with individual companies regarding in-house training fees and instructor compensation based on the same fee structure specified above. In this case, authors shall pay OEOSC a royalty for receiving the OEOSC-endorsement and access to ANSI/ISO material, based on the course length as described in the Royalties section above. Authors of original OEOSC-endorsed training class material who wish to present them at OSA and/or SPIE conferences must follow the guidelines for Arrangements with Professional Societies.

Course Outputs

All class attendees will receive a bound paper copy of the class viewgraphs.

- When the class is provided at a conference or virtually, OEOSC will provide copies of the relevant standards, while the host organization will provide the class viewgraphs.
- The member's company shall provide the copies of the class viewgraphs at its expense when the member presents the class in-house. In-house attendees will not receive a copy of OP1.002 as part of the class materials. However, the member may make a non-printable PDF version of the draft standard available for viewing to company employees on an intranet server.
- OEOSC shall provide copies at OEOSC's expense when OEOSC schedules the in-person class at a company. OEOSC shall also provide five copies of the relevant standards, if appropriate.

OEOSC New Class Application Form

This form is required of all OEOSC members who are seeking OEOSC endorsement of their training classes as well as access to ANSI/ISO materials for their class materials. In addition, members are required to present their training class at a Board meeting for final review. This form shall be submitted to the OEOSC Executive Secretary at least two weeks in advance of the training class presentation for distribution to the OEOSC Board of Directors. The completed form shall be no longer than two pages in length.

1.	Instructor's name
2.	Instructor's mailing address
3.	Instructor's email address
4.	Instructor's affiliation
5.	Proposed class title
6.	Intended audience (including education level of target audience)
7.	Learning outcomes
8.	Related standards (e.g., ISO 10110, ANSI/OEOSC OP3.001)
9.	Class length (e.g., 2 hrs, full day)
10.	Brief biographical sketch (e.g., degrees earned, professional experience related to class material)