

ePIC Conference and Talks Policy

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Section I: Introduction

I.1 Definition of terms

ePIC Results - any plots, tables, numbers, and/or formulas that arise from and/or are based on ePIC (sub)detector simulations or ePIC (sub)detector beam or bench tests.

Published ePIC Results - ePIC Results that have been reviewed and approved according to the ePIC Publication Policy and have been accepted for publication in a peer-reviewed journal. This designation does not include Conference Proceedings that include Public ePIC Results.

Public ePIC Results - all ePIC Results that were approved for presentation outside the ePIC Collaboration meetings and are not yet Published ePIC Results.

ePIC Conference Presentations - all invited and contributed oral and poster presentations of ePIC Results given by ePIC Collaboration Members at scientific conferences, workshops, symposiums, schools, and similar scientific venues.

ePIC Leadership Team - ePIC Spokesperson and Deputy Spokesperson(s) and Collaboration Council Chair and Vice-chair

CTC - Conference and Talk Committee

CC - Collaboration Council

EICUG - Electron-Ion Collider Users Group

CCC - Collaboration Culture Committee

I.2 Policy Scope and Goals

Aligned with the mandates outlined in the ePIC Collaboration Charter, the ePIC Conference and Talks Policy delineates the processes governing the speaker selection, quality assurance, approval, and archival of conference abstracts and oral and poster presentations delivered at scientific conferences, workshops, symposiums, schools, and similar scientific venues on behalf of the ePIC Collaboration. Entrusted to the oversight and management of the ePIC Conference and Talks Committee, this policy establishes procedures aimed at ensuring the equitable distribution of presentations, maintaining collaboration quality standards, and fostering efficient review processes within the ePIC Collaboration. The policy also recognizes that collaborators may present ePIC Results at venues such as seminars, colloquia, job interviews, funding requests, reviews, and thesis defenses. These policies do not extend to monitoring, approval, or archival of materials related to those presentations; however, general rules regarding these presentations are provided.

The primary objectives of this policy are twofold: firstly, to expedite the dissemination of ePIC Results deemed presentation-ready by the ePIC Collaboration, and secondly, to uphold rigorous quality standards while ensuring equitable recognition of individual contributions. By adhering to these guidelines, the ePIC Collaboration endeavors to enhance transparency, collaboration, and professionalism in the communication of ePIC research and technical outcomes.

I.3 Policy Revision

This policy is intended to be revised every two years, and the current version should be reviewed and updated by the CTC no later than October 2028.

Section II: ePIC Conference and Talks Committee

II.1 Responsibilities

The responsibilities of the ePIC CTC are broadly outlined in the ePIC Collaboration Charter. This section further elaborates on those responsibilities, summarizing the direct implementations.

II.1.1 Chair and Vice Chair

- **Act as point of contact and outreach to conference organizers:** The Chair and Vice Chair serve as primary points of contact for external conferences and are encouraged to reach out to relevant conference organizers to directly suggest ePIC-related presentations.
- **Act as liaisons to the ePIC Collaboration and EICUG:** The Chair and Vice Chair facilitate communication and collaboration between the CTC and various entities, including the ePIC CC, the Spokesperson's Office, other standing committees, and the EICUG.
- **Report speaker statistics:** The Chair and Vice Chair report speaker statistics to the ePIC CCC, the Collaboration Council, and the collaboration as a whole at Collaboration meetings, at least annually.
- **Promote diversity among committee members:** The Chair and Vice Chair should strive to ensure diverse representation and expertise within the committee when nominating members.

II.1.2 Full Committee

- **Policy review:** The ePIC Conference and Talks Policy undergoes a comprehensive review every two years. The ePIC CTC collaborates with the Collaboration Council to collect feedback and implement necessary adjustments.
- **Maintain a list of relevant conferences:** The ePIC CTC, in collaboration with the EICUG, maintains a list of relevant conferences for the ePIC Collaboration community, facilitating information dissemination and participation opportunities. This list is shared via the ePIC CTC Wiki page or website.
- **Call for speaker nominations and selection process:** The ePIC CTC issues calls to the ePIC Collaboration for speaker nominations and oversees the selection process for ePIC Conference Presentations, providing clear instructions, reviewing candidates, and making recommendations based on the selection criteria defined in these policies.

- **Maintain a list of speakers:** The committee curates a list of ePIC speakers and nominated speaker candidates along with the rationale for their nominations.
- **Presentation review assistance:** Committee members provide support to presenters and approving entities throughout the review process, offering constructive feedback and guidance on presentation content, clarity, and adherence to standards. They also ensure compliance with the review procedure and policies regarding the preservation and accessibility of approved presentation materials.

II.2 Interactions with Other Standing Committees

II.2.1: Interaction with ePIC Collaboration Culture Committee

The CTC will actively seek advice from the ePIC CCC through interactions with the CTC CCC Liaison. This collaboration will focus on:

- **Nominations support and inclusive inreach strategies:** Collaborating on the development and implementation of inclusive inreach strategies to ensure nominations for a diverse pool of speakers. This includes ensuring representation across various demographic categories such as gender, race, age, career stage, location, etc.
- **Demographic review and identification of imbalances:** Reviewing with CCC Liaison statistics on the demographics of selected and nominated speakers to assess the diversity and inclusivity of the speaker pool and identifying potential imbalances in speaker selection based on tracked categories. This review is aimed at increasing the probability of equitable representation and informs adjustments to the speaker selection process.
- **Integration and improvement:** Integrating feedback from the ePIC CCC into the speaker selection process and all other activities of the ePIC CTC. This includes establishing regular communication channels to exchange information, share updates, and address any concerns or challenges related to diversity and inclusion efforts.

II.2.2: Interaction with ePIC Membership Committee

The CTC will collaborate with the ePIC Membership Committee as needed to ensure alignment between speaker selection processes and membership policies. This may involve seeking advice on the membership status of potential speakers or any aspect of this policy that intersects with ePIC Membership Policies.

II.2.3: Interaction with ePIC Publication Committee

The CTC will collaborate with the Publication Committee to ensure coherence between conference presentations and subsequent conference proceedings - which are under the purview of the Publication Committee. This includes sharing information related to Public ePIC Results,

coordinating archiving efforts, and seeking advice as needed to maintain alignment with ePIC Publication Policies.

Section III: ePIC Conference Presentations

III.1 Selection of Speakers

When selecting speakers to represent the ePIC Collaboration, the following guidelines and criteria are considered by the ePIC CTC:

- **Membership Status:** A speaker should be eligible to present on behalf of the Collaboration according to the criteria defined in the Charter and Membership Policy.

Exceptions to this requirement may be granted in special cases, such as for undergraduate students or technical staff, and should be requested by the institutional representative to the ePIC CTC. The ePIC CTC, after consultation with the ePIC Leadership Team, will grant or not grant the exception. In case of any disagreement, the matter will be referred to the ePIC Leadership Team for the final decision.

- **Criteria for Speaker Recommendation:** Criteria considered when recommending speakers include:
 - Ability to speak knowledgeably on the particular topic,
 - Preference for the primary analyzer to present initial results, where reasonable,
 - Representation of gender, race, geographic location, and institutional diversity within the ePIC Collaboration,
 - Consideration of career status (early, mid, advanced career), including current employment and career transitions,
 - History and number of previous talks given on behalf of ePIC,
 - Special criteria requested by conference organizers.
- **Use of Judgment:** The ePIC CTC uses its best judgment in each case when deciding the relative importance of these criteria.
- **Nomination Process:** Nominations for speakers may come from any member of the ePIC Collaboration, including self-nominations and nominations from members of the ePIC CTC. Nominating individuals should follow the instructions provided by the ePIC CTC regarding the submission of nominations.
- **Announcement of Speaker Recommendations:** After selecting a speaker, the ePIC CTC recommendations will be posted on the collaboration's agreed platform as soon as the speaker accepts the talk. This entails posting to the epic-talk mailing list and the [ePIC Conferences web page](#) and may be subject to potential changes as the Collaboration's document management systems evolve.

III.2 Direct Invitations

Collaborators receiving invitations to speak about ePIC Results directly from conference organizers are expected to inform the ePIC CTC of their intentions to accept or decline the invitation. If declining, they are encouraged to refer the invitation to the ePIC CTC for possible reassignment to another ePIC collaborator. If a conference organizer seeks advice on selecting an ePIC speaker from a collaborator, the collaborator should refer the matter to the ePIC CTC.

III.3 Conference Material Approval

Members of the ePIC Collaboration who have been selected or directly invited for a presentation of ePIC Results are required to follow the approval process described in these guidelines. This encompasses all invited and contributed ePIC Conference Presentations, covering abstracts, posters, and oral presentation slides referred to later in the policy as conference materials. Conference proceedings approval is overseen and managed by the Publication Committee.

The conference materials should include the name of the presenter and the designation 'for the ePIC Collaboration' to denote affiliation.

III.3.1 Approving Entities

The first step of the conference material approval process involves a review by the leaders of the relevant Working Groups or Detector Subsystem Collaborations, called first-step approving entities, depending on the presentation's scope. This includes:

- For presentations on physics topics: the conveners of the primary Physics Working Group.
- For software and computing topics: the conveners of the primary Software Working Group.
- For detector topics: Cross-Cutting Working Group conveners for broad detector subsystem overview presentations or Detector Subsystem Leaders for specific detector subsystem presentations.

The second step involves an open review process by the Collaboration and final approval by the appropriate ePIC Collaboration coordinators, called second step approving entities.

- For presentations on physics topics: the Analysis Coordinator(s).
- For software and computing topics: the Software and Computing Coordinator(s).
- For detector topics: the Technical Coordinator Office.

The ePIC CTC will direct speakers to the appropriate review entity in cases of non-obvious cross-topic presentations. In the event of a disagreement between the ePIC CTC and the presenter for a primarily Working Group or Detector Subsystem Collaboration designation, the matter will be directed to the ePIC Leadership Team for final decision.

If the approving entity is also the speaker, they should recuse themselves from the approving role and request that the CTC appoints another member of the ePIC Collaboration to act as the approver.

Conference materials for general overview presentations regarding the ePIC detector, physics program, or computing and software should be directly forwarded to the second step of the approval process.

Abstracts are only required to undergo one round of review, either by the first step approving entity for specific presentations, or the second step approving entity for overview presentations. In either case, the approval process should follow the appropriate steps described below. The presenter should also inform the CTC of their intent to submit an abstract.

For presentations on other topics than outlined above, for example, community outreach efforts, the CTC will directly define the approval chain and entities. The speaker should contact the committee at least 8 weekdays in advance before the conference begins or before the abstract submission deadline.

III.3.2 Approval Process

- Presenters are required to submit a draft of their presentation or abstract to the appropriate Working Group or Detector Subsystem Collaboration for the first-step approval as defined in Section III.3.1 at least 8 weekdays before the conference begins or before the abstract submission deadline. This currently entails submission to the respective Working Group or Detector Subsystem Collaboration mailing list and may be subject to potential changes upon the implementation of the ePIC Collaboration documentation management system.
- Presenters are encouraged to submit their conference materials well in advance of this deadline, if they anticipate significant issues during the approval process. Any presentation submitted less than 8 weekdays before the deadline may be subject to rejection by the first-step reviewing group and withdrawal of the presentation from the conference.
- Feedback on the conference materials should be sent to both the presenter and the first step reviewing group. Each convener/leader of the reviewing group is expected to communicate their decision on the presentation's approval or disapproval within 4 weekdays of its posting. Failure to respond within this timeframe will result in the convener's/leader's decision not being considered for the approval or disapproval of the reviewed conference materials.
- In situations where two conveners/leaders within a reviewing group cannot reach a consensus, the second-step approval entity will decide based on the available information. In the case of three conveners/leaders within a reviewing group, the majority opinion will determine the outcome. If no response is received from any convener/leader of the reviewing group within 4 weekdays, the second-step approval entity will assume responsibility of approving or disapproving the presentation.

- If the first-step approval is granted, the presenter must post the presentation/abstract to the collaboration's agreed platform at least 4 weekdays prior to the start of the conference or the deadline for abstract submission. At the second step of the review, comments are to be sent to the presenter with a copy to the collaboration's agreed platform. This entails submission to the epic-talks mailing list and may be subject to potential changes upon the implementation of the ePIC Collaboration documentation management system.
- It is understood that the initial and thorough review of presentations occurs at the first step. The second step approver should conduct a final integrity check and ensure that relevant comments from the collaboration from the second step of the review have been incorporated. Upon conclusion of the process, the second-step approver should post a note to the collaboration's agreed platform with the information that the presentation has been approved (or disapproved).
- Conference materials for general overview presentations on the ePIC detector, physics program, or computing and software should be directed directly to the second step of the approval process at least 7 weekdays prior to the start of the conference or deadline for abstract submission. Prior to submission for approval, the authors of these conference materials are expected to engage in active collaboration with Working Group Conveners and Detector Subsystem Leaders to ensure the incorporation of the latest Public and Published ePIC Results and to validate their interpretations and conclusions based on those results.
- The ePIC CTC should contribute to the review of the posted conference materials at the second step of the open collaboration review to ensure alignment with collaboration policies and standards.
- In all instances, a decision to disapprove a presentation or abstract must be accompanied by a written rationale. This rationale should be shared with the ePIC CTC, who will then communicate it to the speaker and the ePIC Leadership Team.
- In very rare and exceptional circumstances, the CTC retains the authority to recommend veto or ultimate approval of conference materials. Such occurrences are expected only in extreme cases, and in such instances, the matter will be escalated to the ePIC Leadership Team for the final decision. The reasoning for any final veto decision must be provided in writing by the ePIC Leadership Team to the ePIC CC.
- The presenter is responsible for submitting the ePIC approved abstract and posting the conference materials on the conference website in accordance with the conference's instructions and deadlines.

III.3.3 Designation and Approval of Public ePIC Results

The criteria and processes for the designation and approval of any ePIC Result as a Public ePIC Result suitable for presentation outside of the ePIC Collaboration are defined in a separate, dedicated Results Release Policy document. All ePIC Results included in conference materials

must be designated as Public ePIC Results or Published ePIC Results as defined in this separate policy document.

III.4 Presentation Rehearsal

Presenters should rehearse their talk prior to the conference. Rehearsals should be organized within their own institutions and/or the relevant Detector Subsystem Collaboration or Working Group, ensuring that the ePIC CC institutional representative or designated substitute is present. For major conferences in the field, a coordinated rehearsal may be organized across different Detector Subsystem Collaborations or Working Groups. This will be initiated by the CTC after consultation with the ePIC Leadership Team.

III.5 Conference Material Archival

Approved conference materials should be stored in a central location, which will ultimately be managed by the ePIC Collaboration documentation management system. This currently entails submission to the ePIC Zenodo document database and may be subject to potential changes.

III.6 Other Presentations

In addition to the ePIC Conference Presentations, collaborators may present ePIC Results at venues such as seminars, colloquia, job interviews, funding requests, reviews, and thesis defenses. This policy does not extend to the monitoring, approval, or archival of conference materials related to these presentations. It is expected that the presenter will make an effort to primarily use Public or Published ePIC Results in these presentations, but in cases where this is not possible, please refer to the Results Release Policy for guidelines on including non-approved results in such talks. While these presentations may not formally represent ePIC, it is understood that the presenter is a member of the ePIC Collaboration, and their affiliation with ePIC is clear to the audience. Therefore, it is crucial to exercise caution when presenting ePIC Results and their interpretations, ensuring accuracy and clarity to avoid misrepresentation.

Collaborators are encouraged to seek feedback from ePIC collaborators to ensure accuracy and alignment with the collaboration standards, thereby contributing to collaboration cohesion. Additionally, rehearsing these presentations with ePIC collaborators whenever possible is recommended.

Adherence to these guidelines demonstrates a commitment to collaboration values and professionalism.