IOP Institute of Physics

Member Networks Committees Handbook

Contents

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Introduction

About this handbook

This handbook is designed to provide committee members across the member networks (groups, nations and branches) with helpful guidelines and examples of good practice.

Please note that while the handbook has been created to apply to all groups, nations and branch committees and their activities, there are some processes that have slight differences and may only apply to one section of the member networks.

What are the IOP member networks?

The member networks are driven by members and are made up of the IOP special interest groups, branches and nations, whose members and committees comprise IOP members.

More information can be found on the IOP website.

What is an IOP branch or nation?

All IOP members are automatically members of a branch or nation based on their home or work address. This provides accessible activities to members in their local area. This can include technical physics lectures, talks, visits, meetings, networking events and public engagement activities.

Members will have opportunity to develop links and engage with other members to share their own knowledge and to support physics and connect physicists in local and national communities.

National and branch committees are run by members on a voluntary basis.

A complete list of the 14 branches and nations can be found at the end of this document in Appendix A or on the IOP website.

What is an IOP special interest group?

An IOP special interest group (SIG) is a community of IOP members with a shared interest in a particular discipline, application, or area of interest.

IOP members must actively join a Special Interest Group (SIG). There is no limit to the number of SIGs members can join and there is no fee.

Activity organised by SIG committees includes physics-related events, one day or multiday conferences, workshops and summer schools. SIGs also give out prizes and members can access travel bursaries.

Like the branches and nations, the committees that spearhead the activity of the SIGs comprise members who serve on a voluntary basis.

The SIGs are an important part of the IOP's commitment to support a thriving physics ecosystem.

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A complete list of all 52 special interest groups can be found at the end of this document in Appendix A or on the IOP website.

Purpose

The member networks exist to always further the aims and objectives of the IOP by:

- Providing an opportunity for members to become professionally registered, networking and community engagement, inspire the future generations of physicists and to help develop and deliver the IOP strategy and objectives.
- Enabling participation of members through encouraging the exchange of ideas and information between physicists from different fields of expertise and areas of employment.
- Supporting, promoting and fostering an understanding of the IOP and physics in the geographic area.
- Collaborating across the member networks and other IOP members in the progression of the above.

The IOP funds the member networks to deliver a range of activities including but not limited to events, prizes and bursaries.

Members of each group, nation and branch (GNB) elect a committee that is responsible for developing the groups, nations and branches activities, which include the following:

Activity	Special Interest Groups	Nations	Branches
Organising events, conferences, seminars, and workshops	X	X	X
Producing newsletters and providing content for communication to share and engage the physics community	X	X	X
Member visits		X	X
Promoting interaction between physicists working in industry and research	X		
Providing opportunities and forums for networking, meeting and discussion	X	X	X
Awarding bursaries to help research students attend conferences via the travel bursary funds	X		
Awarding grants to individuals delivering physics outreach and member activities in the Branches and Nations (link)		X	X
Providing information on relevant meetings organised by other bodies	X	X	X
Responding to policy consultations via the IOP's Policy team	X		
Represent the IOP to the national government(s) or devolved administrations across the range of IOP activities in consultation with Boards and Committees of Council and the Executive staff.		X	

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Resources

Microsoft Teams

To facilitate communication between meetings, and as a file storage space, the IOP uses Microsoft Teams for file sharing. Teams have been set up for all branch committees and some special interest groups have taken advantage of this, too. If committee members are interested in accessing a Microsoft Teams space to keep records of their committee documents, they should reach out to a Member Network Support Officer for assistance.

Mass emailing

Mass or bulk communication to the group, nation and branch members needs to go through Message Focus due to GDPR. Best practice surrounding the regularity of bulk communication should be discussed with the member networks team and IOP communications department.

The Institute is registered under the GDPR. It is required therefore that groups, nations and branches do not hold Member data; this is also related to the fact that data and members' contact preferences may change at any time.

Individual records including e-mail addresses can only be changed with the express permission of the individual. Member information should only be used to notify your group, nation and branch members of activities deemed of interest and relevance to their membership. If in any doubt, please contact the member networks team for guidance.

Forms

Useful forms and templates can be downloaded from the Member Networks Committees Resource page on our website, or via the links below:

Meeting Forms	Room Booking Form
Special interest group Prize Forms	Prize Validation Form
	Winner's Bank Transfer Requisition Form
	Winner's Certificate Request Form
Communications Forms	Membership Email Request Form
Expenses Forms	Expenses Claim Form

Templates

Meeting/Event Templates	Annual General Meeting Notice
	Events Power Point Template - TBC

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Code of Conduct

IOP Code of Conduct	IOP Code of Conduct

Events Resources

IOP Events Calendar	IOP Events Calendar
IOP Conferences Guide	IOP Conferences Guide

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Member network committees

The committees are responsible for agreeing the activity plan for the GNBs, overseeing the running of activities and managing finances.

Who's who?

Committees consist of the following:

Role	Quantity	Maximum Term Length (Years)	Max. Consecutive Terms
Chair	x1	4	1
Vice Chair*	x1	2	1
Secretary	x1	4	1
Treasurer	x1	4	1
Ordinary Member/Early Career Physicist	x9	4	2
ED and I representative*	x1	4	2
Co-opted Member	x3	1	3

* Note the Vice-chair role is not implemented across all committees and, currently, committees are not required to adopt this role. While the duration for the role may vary, the usual term duration is two years. The EDI role is to become compulsory across all committees.

The size of a committee can vary from committee to committee depending on the level of activity, breadth of subject areas; however, the above are the usual limits.

Chair

The Chair is responsible for the direction of GNBs activities. Duties include:

- Speaking on behalf of the community and being the main point of contact with the IOP
- Providing opinion on relevant topics when approached by IOP staff
- Chairing committee meetings
- Ensuring the guidelines, committee membership rules and the IOP Code of Conduct are adhered to.

The Chair should ensure that all tasks are handled by a member of the committee, but they are not expected to lead all activities the GNB undertakes.

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Vice-Chair

The vice-chair supports the work of the chair with a view to self-nominate for the Chair role once it becomes vacant. However, the individual will still need to participate in an open election process.

Secretary

The Secretary is responsible for setting up committee meetings. Duties may include:

- Setting up and coordinating committee meetings, which could include issuing invitations, booking meeting rooms or creating virtual meeting links
- Drawing up meeting agendas (in conjunction with the Chair)
- Keeping a record of meetings (e.g., taking minutes)
- Distributing action points
- Ensuring the committee reports on their activities, when requested by the IOP, in consultation with the committee (e.g., this may include an annual 'activity report').
- Communicating requests on behalf of the GNB to the Member Networks Support Officer (e.g., communication of events or any other requests)

Treasurer

The Treasurer is responsible for monitoring the GNB's spending. Duties include:

- Authorising expenditure
- Requesting payments
- Completing the yearly Funding Request spreadsheet in consultation with the committee
- Giving a brief financial report at the AGM (where applicable)

Ordinary Members/Early Career Physicist

Ordinary Members/Early Career Physicists roles vary and support the work of the committee officers. Duties may include:

- Taking an active role in the planning and organisation of events
- Fostering collaborations with other GNB (where applicable)
- Coordinating digital content (e.g., providing content for newsletters, highlighting other events of interest, etc.)
- Helping to grow the GNB membership – *please note that for special interest groups, we would not expect this to include outreach activities*.

Ordinary members can also be the designated Retired member, Student/Apprentice member, Outreach member and so on for the committee. Please note some committees may also have specific roles not outlined above, which fall under the Ordinary member umbrella.

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Co-opted Members

Reasons for co-option might include:

- Co-opting a member of another IOP group or professional body (e.g., RSC, IPEM, RAS, etc.) for the purpose of programme co-ordination
- Co-opting the local organiser of a major group meeting
- Co-opting an outgoing committee officer to provide continuity following an election
- Co-opting to promote diversity (e.g., gender, ethnicity and disability)

Co-option may *not* be used for the following reasons:

- As a means of avoiding becoming an IOP member
- Circumventing the election process
- To extend the period of office served on the committee

If the co-opted member is required for longer than a year, support must be sought from the committee.

Periods of office for officers and committee members

All committee terms of office run officially from 1 October to 30 September.

After a total of 12 years' consecutive service on a committee, individuals must stand down for at least one year before taking up any position within the same committee.

Ordinary Members/Early Career Physicists may serve two terms consecutively; however, they must stand for re-election at the end of their first term. Thereafter, they may not be re-elected as an ordinary member until two years have passed.

Special interest group committee members cannot serve the same officer position twice within their 12-year period as they must stand down for two years before they do so – for example, a secretary can serve as treasurer or chair next but cannot take the role of secretary again until two years have transpired. This currently does not apply to branches and nations committee, where members can serve the same officer position twice.

Ordinary Members/Early Career Physicists are encouraged to self-nominate for an officer role should one become available at any point during, or at the end of their first term or second term.

Maternity/Paternity/Adoption Leave
All committee members who wish to take maternity/paternity/adoption leave while serving on the committee will have their term adjusted, accordingly. A Member Support Network Officer should be informed so this can be recorded.

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If an officer goes on maternity/paternity/adoption leave, we encourage an existing Ordinary member to fill the role in the interim. If no Ordinary member is willing then the role should be advertised to the membership for the duration of the leave.

Equality, Diversity and Inclusion

In line with the IOP's Diversity and Inclusion aims, committees must ensure they actively encourage diversity, and an inclusive approach and environment, to better represent the interests and needs of their community.

You can find out more about why equality, diversity and inclusion is important to physics, in our recently published document here.

If a committee is having difficulty recruiting a diverse committee, they should contact a Member Networks Support Officer (via membernetworks@iop.org) who will support them.

Unexplained absence from committee meetings or inappropriate behaviour

If, in the view of the committee, a committee member has missed three consecutive committee meetings without good reason, then the individual may be asked to stand down.

Any concerns regarding non-attendance or behaviour deemed inappropriate or not in line with the IOP Code of Conduct may be referred to a Member Network Support Officer.

In all cases, please contact a Member Network Support Officer in the first instance for advice.

Committee member resignations

Resigning committee members should submit their resignation to the Chair via email, copying in the Secretary and membernetworks@iop.org.

Committee officers should notify a Member Network Support Officer as soon as they are aware of any resignation from within the committee where membernetworks@iop.org has not been copied in.

The Chair should also inform the rest of the committee of any resignations.

All vacant positions will be advertised during the next election cycle. More information about the GNB election cycle can be found here.

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Committee meetings

Committees should aim to meet at least twice per year, either virtually or in person. In addition to this, committee officers should meet with committee members ad hoc to plan any upcoming events that are scheduled.

Video and teleconferencing

GNB are encouraged to host hybrid meetings where possible. The IOP provides systems for both, which GNB are welcome to use. Hybrid meetings promote inclusion and sustainability by reducing the need for travel.

Please get in touch with a Member Network Support Officer at least one month in advance of a meeting if you require support with this.

In-person meetings

Committees can book a room for their meeting, free of change at the IOP. Please refer to the Room Booking Form here.

Please be aware that demand for rooms can be high, so you are advised to book in advance. Any catering requested will be charged to the GNB's budget.

Meetings do not have to be held in the IOP building in London. It may be more appropriate to host the meeting within the local region or nation where most committee members can conveniently attend, as would be the case for Branch and Nation committees.

It is up to the committee to decide the most appropriate and cost-effective location for meetings to take place.

Records

Committees are asked to keep records relating to committee business.

Records should be transferred to succeeding officers on the committee. It is recommended that the following information be kept:

- Minutes of committee meetings
- Minutes of annual general meetings
- Newsletters

The IOP uses Microsoft Teams for file sharing. If committee members are interested in using a virtual Microsoft Teams space to keep records of their committee documents, they should reach out to a Member Network Support Officer for assistance.

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Welcome sessions, Training and CPD

As part of the onboarding process, incoming committee members will be invited to attend a variety of sessions and workshops.

The sessions will serve as a sort of induction, allowing for a brief overview of the member networks and what is expected of committees when delivering their programme of activities.

Sessions for all committee members (including Chairs, Treasurers, Secretaries) will cover the following;

- Welcome and opportunity to engage with other committee members
- Roles on the committee and relationship with IOP staff
- Building a sense of community through member networks

Specific workshops for Chairs (and Vice Chairs where applicable) and Treasurers will also be held.

Continuing Professional Development (CPD)

The IOP offers a variety of continuing professional development (CPD) activities to enhance your career. We also award professional registrations.

A comprehensive look at what we offer and how it will help progress your career can be found in the CPD guidance document, which is available at iop.org.

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Annual General Meeting

There is no requirement for GNB committees to hold an Annual General Meeting (AGM), although are welcome to do so, if required. For those committees that hold AGMs, please see the guidance below.

Procedure

Committees planning to hold an AGM must follow certain procedures outlined below:

- Notice of the AGM must be circulated to members at least 21 days in advance
- A completed Annual General Meeting Notice should be emailed to a Member Networks Support Officer and distributed to members
- Once an AGM notice had been issued, the meeting must take place
- Members do not have to confirm their attendance in advance
- The quorum for the AGM should either be 12 members or 10% of the entire group/branch/national membership (whichever is the smaller)
- Many committees hold their AGM to coincide with a conference/event meeting to improve the likelihood of the meeting being quorate
- If the AGM is inquorate, another meeting should be held on the same day of the following week.
- If after 15 minutes that meeting is also inquorate, the number of members present shall be deemed quorum.
- For practical reasons it might not be possible for another AGM to be held exactly one week after the first, but it should be held within one month of the original meeting

Agenda

AGM agendas generally consists of:

- Reports on GNB activity/business from each of the committee officers
- Election/re-election of any committee members (if appropriate)
- Discussion of any new activities the committee would like to undertake
- Items from members not on the committee

Minutes

Minutes of the meeting should be taken by of the Secretary and distributed to the committee.

Expenses

Members cannot claim expenses for attending an AGM. The only exceptions are for GNB officers who must attend to give reports. If an Ordinary member is reporting in the place of an officer, the above exception also applies.

Where an AGM is held at the same time as a conference or event, no fees in connection to this can be claimed.

Additionally, where an AGM is held virtually, rather than in-person, no fees in connection to this may be claimed.

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Committee vacancies, self-nominations and elections

Committees will at regular intervals need to consider succession planning and fill roles that will become vacant, either following the end of a term or a member stepping down prematurely for other reasons. The election process will be overseen by the Member Network Support Officers with input from the GNB committees.

To fill vacant committee positions, an annual synchronised call for self-nominations will be run for all groups, nations and branches. A detailed breakdown of the nomination cycle follows below. Please note that additional communication not listed below may occur during an election cycle.

Date	Action	Lead
March	Email sent to committees to check upcoming vacancies. We will send an email to all committee officers with a list of the vacancies expected in September according to our records. We will also contact current committee members individually to confirm their status on the committee.	Member Network Support Officers (MNSO)
March – April	Committee meeting to be held/succession plans discussed Committees should hold a meeting in the early Spring or ahead of the call for self-nominations. Please include succession planning as an agenda item: • Communicate the term dates for all current committee members, which would have been provided by the MNSOs • Communicate which roles are up for nomination • Communicate who can stand for re-election, where relevant • Communicate if there are any upcoming vacancies for officer roles and whether current committee members can self-nominate for those roles *Please note that while current committee members can self-nominate for an officer role and are encouraged to do so, it is not guaranteed that they will be successful.*	GNB Committees
March – April	Confirmation sent by committee, confirming upcoming vacancies Following the initial email from the MNSOs and Committee meeting, the committee officers will confirm the following: • The number of Ordinary members vacancies • Details of any upcoming officer vacancies (Chair, Treasurer, Secretary). These roles can be filled via any of the following: ○ Nomination from within the current committee ○ Nominations from the wider group	GNB Chair and Secretary

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April	Call for self-nomination launched Communications are sent to the full membership of each GNB committee where there are vacancies, inviting them to view the vacancies and self-nominate. The call for nominations will remain open for at least 28 days. Reminders will also be sent out to the wider membership during this time. *Please note that all self-nominations will be reviewed, to ensure they meet the eligibility criteria, which is listed below.*	Member Network Support Officers (MNSO)
July	Online election to be held for any vacancies with multiple nominations. Where there is there is only one self-nomination for any vacancy or the same number of self-nominations as vacancies advertised, the candidate(s) will be elected unopposed, and an online election will not be necessary. Where there are more self-nominations than roles advertised, an online election, whereby member of the GNB cast their vote to elect new committees, will need to be held. The election will be organised by the MNSOs. The wider membership will be invited via email to cast their votes. The election will remain open for a minimum of 21 days. If there are no self-nominations for any vacancy, the committee is welcome to leave those posts vacant until the next election cycle or they can make an appointment in October if they feel the post must be filled for the committee to function. Please note that the incoming members will need to meet the eligibility criteria listed below. If officer roles remain vacant after the close of the nomination cycle, the committee is advised to do the following; - Serving officers who have completed their four-year maximum term may be appointed for a further year. - Should the outgoing officer not wish to take on the post for another year, then the post should be taken up by a current committee member for the duration of a year. The post(s) will be included in the following years nomination cycle.	Member Network Support Officers (MNSO)
July/August	Close online election. The first past the post system will be used to determine successful candidates for any post that has gone for elections.	Member Network Support Officers (MNSO)
August-September	Emails sent to all candidates on the outcome of their nomination. Incoming members will be informed of any planned welcome and training sessions and specific workshops for the role. They	Member Network Support Officers (MNSO)

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	will also be introduced to Committee officers at the time via email.	
01/October	Start of the term of new committee.	N/A

Additional guidance for issues outside the standard nomination cycle

1. Should a committee member leave during a live nomination period, we will add the vacancy to our records and advertise it to the membership.
2. If an officer or other role remains vacant after the nomination cycle, we will work with the committee to recruit a replacement AFTER 1 October. In the interim, a committee member can step into the role for up to one year. This same role will go up for nomination during the next nomination cycle.
3. Where an Officer nominates themselves for another back-to-back four year term, they will be able to serve in that role for up to one year whilst we work with committee to source a replacement (see point 2).

The membership of the IOP is diverse; therefore, we encourage our committees to reflect this. We welcome nominations that reflect and celebrate the breadth, geographic spread and diversity of our community.

Please note all committee positions, both for committee members and officers must be advertised to the wider membership and where necessary, progress through the elections process to promote fairness and consistency in the process.

Self-nominations must be submitted through the online form via https://www.mi-nomination.com/iop.

Eligibility

To be eligible for nomination the person must be a member of the IOP, with an active or applied membership status and a member of the group, nation or branch.

To be eligible for an officer position the individual must hold MInstP, FInstP or Hon.FInstP membership of the IOP.

All grades of membership are eligible for Ordinary member committee positions.

Members applying for the role of Retired member must be formally retired.

The Member Network Support Officers will review the eligibility of nominations when self-nominations are submitted.

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Programme of activities

Delivery plans and measuring performance

Special interest groups

Every Autumn, group committees must submit a Funding Request for the following year.

The IOP reviews and approves these, and subsequently notifies SIGs of their agreed annual budget for the year to come.

The following guidance notes are to support group officers with developing business plans and outlining their committee's proposed programme of activities for the year.

Committee Meetings

1. It is recommended that committees hold a minimum of two, with good practice for four committee meetings (in-person or virtual) per year to build an exciting programme for members.

2. Hybrid meetings should be encouraged where possible (i.e., a combination of in-person and virtual participation).

3. In-person meetings should follow the most up to date guidance on Covid-19 restrictions provided by the IOP.

Please contact membernetworks@iop.org for any queries.

Activity

4. Each special interest groups' programme of activity typically includes:

    - Workshops

    - Forums

    - One day meetings

    - Conferences

    - Newsletters

    - Prizes

5. The programme of activity should include at least two IOP group events a year.

6. At least one IOP group event should be organised jointly with another IOP group.

7. One day events should use the IOP Conference self-service, and multi-day conferences should use the IOP full Conference service.

8. Special interest groups intending to use the IOP Conference service must notify the IOP Conferences team in sufficient time ahead of the intended date(s) of the event (i.e., a minimum six weeks for a webinar, three months for a one-day meeting, and 12 months for multi-day conferences). If the IOP Conferences team is not given sufficient notice, then there is no guarantee that they will be able to support its organisation or schedule it for the desired date(s).

9. Group events should aim to reflect the interests of the group's membership.

10. Special interest groups should aim to ensure a minimum attendance of 40 people.

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11. Special interest groups may wish to hold an Annual General Meeting (AGM); however, there is no formal requirement to do so.

12. Group events must be as inclusive and accessible as possible, ensuring diversity of participants and organisers of the event.

Nations and Branches

13. Nation and branch committees are expected to deliver several talks/lectures, member engagement activities and networking events for the benefit of members within the region.

14. Nation and branch committees will often organise public events on behalf of the IOP. Committees are asked to report back on these events via the Public Event Tracker form. In this way, the reach and impact of the various activities can be logged and reported back on when necessary.

Membership and communication across the Member Networks

15. Groups, nations and branches should communicate regularly with their members via the Member Networks Support Officer, using targeted, bespoke emails, regularly scheduled newsletters and centralised newsletters.

16. An event bulletin is sent out twice monthly and highlights activities, events and opportunities tailored to members preferences, based on the groups, nations and branches they have selected in their IOP Connect account. Content for the bulletin is generated from information gathered from iop.org/events, information provided by committees and across IOP departments.

17. A quarterly groups, nations and branches newsletter is sent out in the spring (March), summer (June), autumn (September) and winter (December). The newsletter contains committee updates on the activities of the last quarter and a look forward to what the committee have planned. It will also celebrate our members who have achieved professional registration and/or Fellowship. Members will receive news specific to the groups, nations and branches they have selected in their IOP Connect account. Content for the newsletter is generated from iop.org/events, information provided by committees via the GNB Newsletter - Call for Content form and across IOP departments.

18. Communications should include:

    - Promoting upcoming IOP events, when not already advertised via the newsletter or via IOP Conferences

    - Calls for nominations for prizes

    - Requesting input into IOP policy consultations

    - Requests for volunteers to support public engagement activities

    Communications should include members post nominals.

19. Committees should encourage take up of membership and professional registration, and participation in their programme of activity.

    More information about email communication is included at the end of this list.

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Grants for external (non-IOP) events – only applicable to special interest groups

20. IOP SIG funding is primarily there to fund activities to support IOP members. Where there is obvious benefit to the physics community, group committees may budget to allocate a grant or sponsor an event organised by an external organisation.

21. The total amount requested for external events support must not exceed the total amount requested in the events subsidy section of the Funding Request.

22. If more than one grant is required to fund an external event, the group should discuss this in advance of submitting annual plan.

Email interaction and communication

Committee members are able to continue or develop a personal communication directly with an individual via email, i.e. using your personal email to send and obtain emails from individuals (not mass mailings). However, you must not use your personal email or address book as a marketing tool to promote IOP related activities. This must be done via the IOP on the group, nation or branch's behalf. This process is outlined below:

Process to marketing our events

New compliance regulations means the IOP has to become much tighter in controlling access and management of personal data. Following this process will allow smoother control whilst maintaining flexibility for GNBs to continue to drive and promote events. If you have any questions please contact the Member Networks team.

- IOP Conferences will manage the marketing of events registered with the team
- For other marketing emails, please use the Membership Email Request Form
- Fill in all the relevant fields and return the form to membernetworks@iop.org.
- From the form being submitted we will endeavour to create and schedule a bespoke email within 3-5 working days - note that this does not mean the email will be sent within 5 days, but scheduled.
- IOP staff will create the email within our email marketing system and make sure that it is on brand
- Personal data (i.e. email address), which is held centrally, will be added and the relevant suppression lists will be applied
- Email will be scheduled and sent by IOP

If an individual raises a complaint to you regarding receiving unwanted communications or anything else related to the use of their data, then please forward that immediately to the Member Networks team who will ensure that the request is followed through and necessary updates completed.

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Sponsorship and promotion of other group and external events

As well as organising their own meetings, special interest groups may from time to time identify an event being organised by another institution or group or be approached by another organisation and decide that they wish to sponsor the event to benefit IOP members.

Sponsorship of events tends to fall into one of four types;

Event Type	Lead Organiser	Financial Support Provided
Type 1	External organisation	No financial support from the group
Type 2	External organisation	Group provides only financial support but has no further involvement in the organisation of the meeting.
Type 3	External organisation, but with some group involvement (e.g., input into the organisation and scientific content/programme)	Financial support may or may not have been given
Type 4	Another IOP group (your group was <u>not</u> involved in organisation)	Financial support from the group

Guidelines for sponsorship arrangements

1. For all types of sponsorship, in return for publicising the event to IOP members, special interest groups should ensure that they are listed as a sponsor. IOP members may also be entitled to any reduced registration fee offered.

2. For **Type 2** sponsorship, special interest groups are asked to think carefully before offering financial support. Committees should agree that there is a genuine benefit to their group members above and beyond the simple of lowering of registration fees.

3. For **Type 3** sponsorship, there must be a genuine input from the special interest group into the event (e.g., developing the programme, identifying and inviting speakers, etc.)

4. The amount given towards event sponsorship must be *lower* than the guideline amounts for the subsidy of your own meetings. If multiple special interest groups are sponsoring the same meeting the guidelines relate to the overall contribution, not the contribution from each special interest group.

5. Special interest groups should not use sponsorship as a replacement for organising their own meetings.

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Promoting sponsored meetings

Committees should advertise sponsored meetings to the wider membership via email through a Member Network Support Officer. Please use the [Membership email request form](#)

Type 1, 2 and **3** sponsored events should be listed in the annual report under events organised by external organisations.

Type 4 sponsored events should be listed under supported IOP meetings.

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Events subsidy – applicable to Special Interest Groups only

IOP group events must use IOP Conference services for in-person, hybrid and virtual events.

Using the IOP Conference service ensures that accurate data is collected, events are marketed in accordance with IOP branding, as well as compliance with GDPR.

The following table outlines the <u>maximum</u> amounts that can be requested for organising events, and the level of IOP Conference service that must be used:

Events organised by a single group/nation/branch		
IOP Conference Service	**Duration**	**Max. subsidy**
Self-service	Half-day event	£500
Self-service	One-day event*	£1,000
Conference-management service	Multi-day conference	£1,000 for the first day, plus £500 for each additional day
Joint events organised by more than one group/nation/branch		
IOP Conference Service	**Duration**	**Max. subsidy**
Self-service	Half-day event	£750
Self-service	One-day event*	£1,500
Conference-management service	Multi-day conference	£1,500 for the first day, plus £750 for each additional day
* One day covers any meeting taking place within a 24-hour period, (i.e., an event taking place over the course of either one day or two consecutive half-days).		

Please note, the maximum subsidy does not change if more than two committees are organising a joint meeting. The figures will remain as stated above.

Committee intending to hold joint events with other committees, including thematic conferences (e.g., Photon), must make clear the level of their planned contribution and the names of other committees involved.

Internal and external events

Internal
Internal group organised events are defined as those using either of the two conferences services (i.e., self-service or conference-management service).

External
External events will be those not using the IOP Conference services and are usually organised by external organisations.

For more information, please download the IOP Conferences Guide.

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IOP Institute of Physics

Finances and payments

Introduction

Each year groups, nations and branches are asked to complete the Funding Request spreadsheet, which is used by the IOP to assist in making funding allocations for each committee.

IOP group/nation/branch Funding Request Spreadsheet

Each year, committee treasurers are provided with the 'IOP group/nation/branch Funding Request' spreadsheet, showing budget allocations and spending for the last 3-5 years, as well as spending to date for the current year (up to the end of July/August).

The spreadsheet allows committees to provide detail beyond the headline amounts requested, as it is important that all amounts requested are realistic and fully justified.

All relevant fields within the spreadsheet should be completed, providing as much detail as possible.

Completing the spreadsheet

The Funding Request spreadsheet is broken down into seven sections. Committees are asked to consider their possible spend across each of these and enter the overall amount the committee wishes to request against the following:

1. **Income (10900)**

Please list any income expected from sources other than IOP (e.g., sponsorship from external organisations) including comments about where the income is from, and any specific plans for that money (e.g., sponsorship of annual conference or for a group prize).

Joint groups should enter how much income is expected to be received from their joint institution if a joint group with another learned society (e.g., Polymer Physics, etc.)

Special interest groups cannot carry forward funds from one year to the next.

2. **Committee expenses (32010)**

This relates to costs incurred for committee meetings including expenses and catering.

Where committee expenses requested are over £2,500 (which is based on average group spend), please include an explanation under the description column of the spreadsheet

3. **Events Subsidy (32025)**

This relates to costs associated with organising a group event (e.g., room hire, catering, speaker expenses, expenses incurred by the organising committee). This also includes the subsidy for meetings the committee organises in conjunction with the IOP Conference team and contributions to joint group events/meetings organised by other IOP special interest groups.

4. **External Events Support (32020)***

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This relates to costs incurred for financial contributions to an event being organised by another organisation/institution (even where the group is involved in the organisation).

Where there is obvious benefit to the community, special interest groups may budget to allocate a grant or sponsor an event organised by an external organisation.

The total amount requested for External Events Support must not exceed the total amount requested in the Group Events Subsidy section.

On the IOP Group Funding Request Spreadsheet, please provide details for each external event you plan to grant or sponsor, selecting options from the dropdowns provided.

* Note, this budget line may not apply to nations and branches committees.

1. **Newsletter and Communications (32065)**

This relates to costs incurred in the creation of materials.

Materials should be wholly digital as we no longer allow for print, except in exceptional circumstance agreed with the IOP.

2. **Subscriptions and Affiliations (32070)**

This relates to costs incurred for any subscriptions held by committees to another organisation/institution.

3. **Prizes (32080)***

Funding should only be requested for prizes that have already been validated by the IOP.

* Note, this budget line may not apply to nations and branches committees.

The following nominal codes are included in the nations and branches funding request sheets. Committees should include figure against these nominals, where necessary.

- 32000: Grants and Bursaries
- 32015: Partnership & Collaboration
- 32030: Lecture Programme
- 32035: Outreach
- 32040: Recognition and Recruitment of Volunteers
- 32085: Education Activities
- 32090: Branch and Groups General Expenditure

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Funding Request Submission and Review

Committees will be advised of the deadline for submission of their Funding Requests each year, following which the amounts will be checked by a Member Network Support Officer before internal sign-off.

Committees will be informed of the outcome of their requests, and any amendments by the end of each financial year.

Should any committee officers have questions regarding these guidelines or would like some help and advice completing their Funding Request, then please contact a Member Networks Support Officer via membernetworks@iop.org or branche@iop.org.

Banking arrangements

Committees' funds are held as part of the main IOP budget.

Individual committees do not have separate bank accounts.

Authorisation for use of committee funds must come from the Treasurer or another officer.

Accounting

The IOP's financial year runs from 1 January to 31 December.

The IOP's Finance department produces quarterly statements of account, which are emailed to all committee officers.

Should there be a requirement for an up-to-date statement ahead of a committee meeting, we kindly ask that you reach out to the Member Networks team at least 10 days in advance.

Statements should be checked by the Treasurer and any queries emailed to a Member Network Support Officer.

For conferences organised by the IOP Conferences team, a closure report should be sent to committees within six months of it taking place for multi-day conferences, and three months for one day meetings. This allows time to receive final invoices from the venue, and to process speaker expenses, outstanding registration fees, etc. An interim report can be provided, on request.

For self-service meetings organised by special interest groups, invoices are paid automatically via internal transfer and appear on the quarterly group statement.

Managing Over/Underspend

GNB committees will work with the IOP team to manage any over- or underspend of approved budgets.

Treasurers will be sent financial statements on a regular basis, so that effective oversight can be achieved.

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Where officers anticipate their spending may exceed more than 10% of their total agreed budget for a conference/event, they must contact their Member Network Support Officer, as soon as possible.

Committees who continuously overspend may find that no further additional funds are made available to them or may receive a set level of funding in subsequent years.

Sources of funding

The IOP provides special interest groups with financial support through several routes:

1. **Group funding request**

   This constitutes the bulk of group funding allocation.

2. **General fund**

   Pays expenses for the Group Officers Forum and Nation and Branch Committee meetings.

3. **Travel bursary funds**

   The IOP provides financial support to research students to attend international meetings and major national meetings. While the IOP manages the application process, it is the relevant IOP group that makes a final decision on awarding the bursary and its value.

Authorisation of expenditure

Invoices, expense claims and other requests can be paid only upon receipt of approval (this includes email) by an officer.

Special interest groups:

The special interest group Treasurer should email membernetworks@iop.org with as much information as possible to assist processing (e.g. the name of the group, a short description of the item to be processed, the budget line it sits against, details of the member requesting it, etc.) and include the invoice or receipt as an attachment.

Payments made by the IOP Conferences team must also receive authorisation from a group officer (e.g., where transfers are made from a group account to a conference account).

Nations and branches:

The Treasurer should email london.finance@iopfinance.org with as much information as possible to assist processing (e.g. the name of the group, a short description of the item to be processed, the budget line it sits against, details of the member requesting it, etc.) and include the invoice or receipt as an attachment.

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Costs incurred at the IOP (e.g., print and postage costs or meeting rooms booked through a Member Network Support Officer) will be charged directly to the GNB account and do not, therefore, require authorisation by a committee officer.

Treasurers cannot authorise their own expense claims and should be approved by another Officer.

Who do I send financial requests to?

Requests regarding the group budget should be referred to a Member Network Support Officer.

Requests relating to events organised by the IOP conferences team should be sent to the relevant Events and Conference Organiser in the IOP Conferences team (including transfers from the group account to a conference).

Invoices

Invoices that are to be paid by the group should be made out to the IOP and should be sent to a Member Network Support Officer.

Please include the group, nation or branch name and short description (e.g., sponsorship of xx conference) on invoices, so that payment can be charged to the correct group.

Please ask the supplier to invoice the IOP with the details below:

FAO XXX Group/Branch/Nation
Institute of Physics
37 Caledonian Road
London N1 9BU

If it is not possible to raise an invoice, we can make payment by BACS. Please contact a Member Network Support Officer who can supply you with the appropriate form.

If a group has secured external income (e.g., sponsorship for an event/conference) then the Member Network Support Officer can raise an invoice which will be sent to the sponsor to acquire payment.

Committee member expenses
The IOP will reimburse reasonable expenses incurred by committee members for group, nation and branch activity. This also includes members not on the committee who are supporting activities, such as outreach events.

Members wishing to claim expenses should complete and submit an Expenses Claim Form along with receipts, to the Treasurer of the committee for approval/authorisation. They will then forward the form to a Member Network Support Officer for payment.

Claims sent directly to a Member Network Support Officer will still need to be authorised by the Treasurer of the committee. Treasurers should have their claims authorised by another Officer of the committee (Chair, Secretary, etc.).

Committee members may not claim expenses for the following:

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- Attending a group AGM (unless they are officers presenting reports)
- Costs incurred attending a conference (including registration fees)
- Loss of earnings while undertaking committee activities

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VAT guidance

1. **Prizes**

   Cash prizes are outside of the scope of VAT, so no VAT is payable on prizes given.

2. **Invited Speakers**

   If a committee contributes towards a conference by covering travel and subsistence costs for one or more invited speakers, then such a contribution (or grant see below) is exempt from VAT. Such expenditure falls within a 'supply of education' *. An invitation to give a plenary talk is an honour in the same spirit as the award of a prize (with some people listing or enumerating them within their CVs).

3. **Grants and Sponsorship given by a group**

   It is critical to determine what is a grant and what is sponsorship.

   A freely given grant with 'no significant benefit' received by the Group is outside the scope of VAT and, therefore, no VAT will be charged on the grant.

   A grant (or donation) is where the payment is freely given, and the group receives nothing in return other than a simple acknowledgement such as IOP's name being included in a list of supporters in a programme.

   Any other payment (even if called a grant) where anything other than an 'insignificant benefit' is received by the Group will be subject to VAT. This may be referred to as sponsorship. Examples of such benefits include the IOP's name or logo displayed at an event, naming the event after the IOP or being allowed free or preferential rate access to an event.

   If the payment is a true 'grant' it is outside the scope of VAT.

   If it is not a grant, and is sponsorship, then the expense is subject to VAT at 20%" – so special interest groups should add 20% to sponsorship expense to budget for VAT.

4. **Promotion in IOPP materials**

   Promotion of special interest groups events in IOP Publishing (IOPP) material (e.g., journals, publications, Physics World) are exempt from VAT (i.e., no VAT is charged on these costs).

5. **Transfers between special interest groups**

   Any funds transferred between special interest groups are exempt from VAT.

6. **Venue hire exemption**

   In most cases any venue hire by the group will be subject to VAT at 20%. However, where the room hire is at a university, school or further education college and the group is making a 'supply of education' * no VAT will be charged on the room hire.

   Special interest groups should complete a VAT exemption form to provide to the venue, a template for which can be provided on request from a Member Networks Support Officer.

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* 'Supply of education' is defined by the HMRC as a course, class or lesson of instruction or study in any subject. It includes lectures, educational seminars, conferences and symposia. It does not include admission to plays, concerts, and exhibitions. For example, a lecture to group members on a new topic would be a supply of education; a committee meeting or social event would not be a supply of education.

IOP Institute of Physics

Special interest group prizes

Publicity

Details of the group prizes including the call for nominations and winner announcements should be:

- Circulated to group members via email
- Advertised on the group website
- Included in newsletters (where applicable).

Nomination process

Groups should consider the following when calling for entries and awarding prizes:

- An open and fair process of nomination must be followed
- The nomination process must be consistent with the law and IOP policy
- Promoting EDI is encouraged, and groups may use specific criteria if they are aiming to widen participation and encourage entries from underrepresented groups
- Group prizes at conferences must be open to all, regardless of entrants' geographical location or whether they are a member of the IOP

Eligibility Criteria

The following are not eligible to receive a group prize*:

- Current employees of the IOP
- Council members
- Members of the group committee

* These exclusions apply at the time of the meeting to ratify the winner (except in the case of group committee members, where the exclusion will apply from the time of nomination).

Specific criteria are left to the discretion of the group, providing it meets with IOP policy (e.g., prizes may be aimed at physicists in the early stages of their career); however, such criteria should not be worded as to discriminate on grounds of age.

The IOP defines early career as meaning someone who is (and allowing for career breaks):

- Within six years of completing their PhD
- Or (if they do not have a PhD) within 10 years of the start of their first employment contract where research and/or the application of physics is the primary function of their role

Certificate and Prize Money

Once a winner has been confirmed, a Winner's Certificate Request Form should be provided to them by the committee.

If there is prize money a Winner's Bank Transfer Requisition Form should also be provided.

Completed forms should be returned to membernetworks@iop.org directly from the winner.

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The categories of prize and IOP's maximum monetary contribution to each one is as follows:

Prize Category	IOP Max. Contribution
Oral presentation	£100
Poster (and other media production)	£100
Best paper/Best essay/Thesis	£250
Outreach	£100
Outstanding contribution*	£0
*Special interest groups should present no more than one outstanding contribution prize	

The cash limit on prizes includes not only the winner's money, but also any money given for second and third places, too.

Special interest groups may present multiple prizes; however, the overall limit will still apply (e.g., five poster prizes of £20 or one poster prize of £100).

Special interest groups cannot 'save up' money by presenting the prize in alternate years to offer a higher prize value.

Any increase in value to an existing prize must be ratified by the IOP before an agreement is made.

Special interest groups who wish to present more than one prize must demonstrate that they are of sufficient size to administer them and that there is no overlap with existing prizes or awards.

If a group presents more than one prize, then the annual prize budget of that group should not exceed the equivalent of £3 x number of group members.

Please contact a Member Network Support Officer to arrange for prize payments to be made.

Exemptions

Prizes which are awarded jointly between a group and another organisation will be considered on a case-by-case basis. Flexibility of the cash limits will be dependent on the involvement of the joint organisation.

Prizes with an endowment and specific terms are exempt.

Prize Validation

All prizes must comply with current legal requirements and are subject to the same revalidation process following submission of a Prize Validation Form.

Requests for new prizes must be ratified by the IOP.

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Prizes not validated

Prizes that have not been validated should not be awarded.

Validation forms for new prizes may be submitted to the IOP at any time for approval.

Revisions to validated prizes must also be submitted to the IOP for approval.

Revalidation

Group prizes will be revalidated every five years.

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IOP Institute of Physics

Web pages

Content

Each special interest group, branch and nation has its own page on the IOP website. Committee officers or another designated committee member are encouraged to review this periodically to ensure the information on it is up to date.

The following content is generally included on each web page:

- About the group, nation or branch
- What the group, nation or branch does
- Newsletter (where applicable)
- Group prizes (applicable to special interest groups)
- Link directing users to iop.org/events for group, nation branch specific events
- Meetings (where applicable)
- Useful links
- Committee list with up-to-date IOP postnominals

Updating the Web Page

To update a group, nation or branch web page, please email membernetworks@iop.org with the changes you wish to make.

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IOP Institute of Physics

Power BI for GNB Committees

The IOP Physics Insights team has created a set of interactive dashboards that contains visualisations of IOP groups, nations and branches membership data specifically to support the work of the committees. The visualisations are powered by the information contained in the IOP membership database.

The data includes information on the number of members in each group, nation and branch, the location of members, the gender profile of members, known employers of members and much more.

Committees will be sent visualisations of the dashboards at regular periods, usually every quarter.

Committees are encouraged to use this data to support their activities and membership growth. It will help you understand the demographics, as well as that of other GNBs and the whole of IOP membership. We suggest Power BI should be a standing item at each committee meeting.

Please email membernetworks@iop.org if you have any questions or would like to be provided with more in-depth visualisations.

Examples of some visualisations can be found on the following page.

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IOP Institute of Physics

Overall summary

Applied Mechanics

1,180	590 (50%)	60 (5%)	530 (45%)
Current Membership	Members	Fellows	Associate Members

Distribution by Age

Gender ● Female ● Male ● Other / Unknown

Average Age: 35

Gender	Female		Male		Other / Unknown		Total	
Age Brackets	Members	%	Members	%	Members	%	Members	%
15-19	50	4%	110	9%	<10		160	14%
20-29	120	10%	350	29%	<10		480	40%
30-39	30	3%	150	13%	<10		190	16%
40-49	20	2%	110	9%	<10		130	11%
50-59	20	1%	90	7%	<10		100	9%
60-69	<10		70	5%			70	6%
70-79	<10		30	3%			40	3%
80+			10	1%			10	1%
Total	240	21%	920	78%	20	2%	1,180	100%

Number of Members by Countries

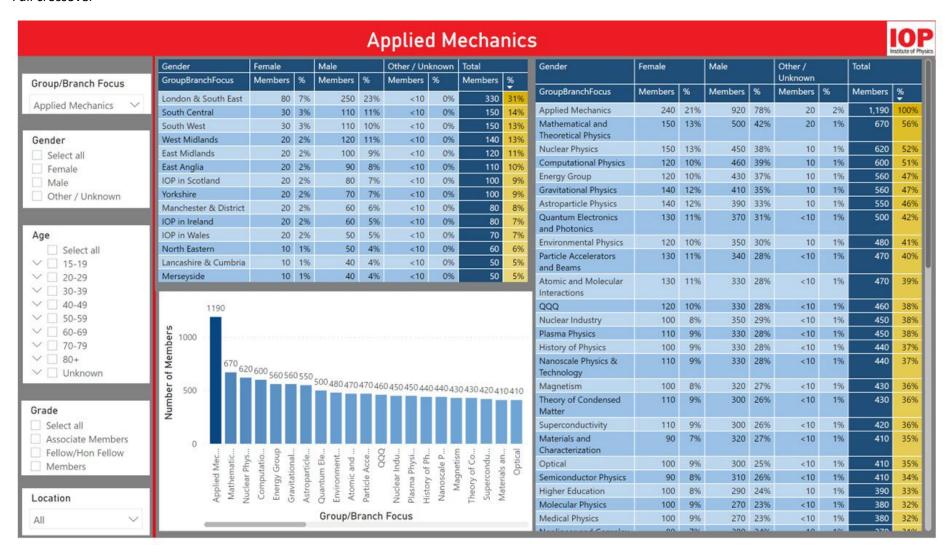| Gender	Female		Male		Other / Unknown		Total	
Location	Members	%	Members	%	Members	%	Members	%
England	170	15%	660	56%	10	1%	850	71%
Scotland	20	2%	70	6%	<10		90	8%
Other Worldwide	10	1%	70	6%	<10		90	7%
Wales	10	1%	40	3%	<10		50	4%
Ireland	10	1%	30	3%	<10		40	4%
Other Europe	<10		30	3%			40	3%
Northern Ireland	<10		20	1%			20	2%
Other British	<10		<10				<10	
Total	240	21%	920	78%	20	2%	1,180	100%

Regional Levels

Group/Branch: All Members

Group/Branch Focus: Applied Mechanics

Gender: Select all / Female / Male / Other / Unknown

Age: Select all / 15-19 / 20-29 / 30-39 / 40-49 / 50-59 / 60-69 / 70-79 / 80+

Grade: Select all / Associate Members / Fellow/Hon Fellow / Members

Location: All

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Full crossover

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IOP Institute of Physics

Tools for supporting engagement

The activity across the Member Networks will bring members and volunteers into contact with various groups across society, at times including children and potentially vulnerable adults.

Safeguarding children and vulnerable adults

The IOP has an obligation to ensure that when dealing with children and vulnerable adults, its staff and volunteers provide the highest possible standards of service and care. Guidelines have been produced, which should be shared with committee members and other volunteers as widely as is practicable either at the start of a committee member's term or ahead of outreach activities.

Safe Guarding Policy

Children and vulnerable adults policy summary

Code of Conduct

IOP Code of Conduct

The Code of Conduct sets out expectations of behaviour that the IOP requires to be upheld and which all members are expected to adhere to.

Every member of the IOP regardless of their role and area of responsibility is expected to uphold the IOP's values of:

- being objective, led by evidence
- being rewarding, open and engaging to work with
- confronting barriers to inclusiveness and participation wherever encountered
- exemplifying the highest standards in all that they do

The Code applies to all members acting on behalf of or promoting the work of the IOP, including, e.g.,, members who volunteer for the IOP and members who engage in any form of online activity for the IOP.

The IOP also expects the standards set out in the Code to be upheld by its members at conferences, meetings, events and other social activities regardless of the capacity in which the member is attending (be it as an organiser, delegate, speaker, sponsor, exhibitor, or in any other capacity).

Members are expected to uphold the principles set out in the Code at all times during the relevant event, including at all conference venues, conference accommodation and conference-related social activities.

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Many of the principles set out in the Code are designed to ensure that individuals feel safe and comfortable when interacting with the IOP and have an inclusive experience; much of what is set out in the Code is relevant to others who, although not members, have contact with the IOP. The Code will apply to meetings, conferences and other similar events and such individuals who participate in them.

The Code of Conduct is available to read on the IOP website.

IOP Institute of Physics

Forming a New Special Interest Group or Branch

Groups continually evolve with new groups forming to reflect different and / or growing areas of interest within physics.

Should someone wish to propose a new group then they should contact a Member Network Support Officer to discuss how to go about this.

The formation of a new special interest group usually follows the following process:

1. Interest in forming a new special interest group is expressed by members.

2. The proposer is asked to complete a new special interest group proposal form, making clear what the group's purpose will be and that there are at least five supporters. The proposer and supporters will be the drivers for the new special interest group and will likely form the first committee if the new special interest group goes ahead.

3. If there is no clear overlap with existing special interest groups then we ask the supporters to meet with IOP staff to discuss the proposal in more detail and should proceed to stage 4. If there is overlap with existing groups, the proposal is circulated to the relevant chairs for their comments. If existing special interest groups are supportive of the new group, then the process should proceed to stage 4,

If existing special interest groups feel that the new group should not proceed for any reason (perhaps the area is already/can be sufficiently covered by collaborations across existing special interest groups) then a meeting is called with representatives from the relevant groups, the proposer of the new group and IOP staff. If there is support for the new group, then the process should proceed to stage 4. If it is agreed that a new group is not necessary, then the existing special interest groups will be asked to consider whether they could broaden their activity to include the proposed subject area and whether the proposer/supporters could join an existing committee. The proposal is then sent to the IOP for consideration.

4. A town meeting is called where people who might be interested in joining the group are invited. Assuming that this is successful and there is enthusiasm for a new group then the process will continue. The town meeting is also an opportunity to find people who may like to join the new group committee.

5. The proposal is circulated to all special interest groups for their input. The proposal, comments and notes of the town meeting are then submitted to the IOP for consideration.

6. If the IOP agrees to the proposed group, then it recommends to Council that a new group is formed. Council then makes the formal approval.

7. The new group begins.

A similar process will be adopted for the creation of new branches.

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IOP Institute of Physics

Appendix A

Nations and Branches

There are 11 distinct branches within

- East Anglia
- East Midlands
- Lancashire and Cumbria
- London and South East
- Manchester and District
- Merseyside
- North East
- South Central
- South West
- West Midlands
- Yorkshire

A map of the branches is available here

The IOP is also the professional body and learned society for physics in the UK and Ireland. As such each of the nations also have branches in place.

- IOP Ireland
- IOP Wales
- IOP Scotland

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IOP Institute of Physics

Special Interest Groups

There are 52 distinct special interest groups. There is no limit to the number of groups an IOP member can join.

A	B	C, D
Applied Mechanics Group Astroparticle Physics Group Atomic and Molecular Interactions Group	Biological Physics Group British Carbon Group British Radiofrequency Spectroscopy Group (Magnetic Resonance Group) Business Innovation and Growth Group	Combustion Physics Group Computational Physics Group Dielectrics and Electrostatics Group
E	**F, G, H**	**I, L**
Early Career Members Group Electron Microscopy and Analysis Group Energy Group Environmental Physics Group	Food Physics Group Gravitational Physics Group High Energy Particle Physics Group Higher Education Group History of Physics Group	Instrument Science and Technology Group Ion and Plasma Surface Interactions Group Liquids and Complex Fluids Group Low Temperature Group
M	**N, O**	**P**
Magnetism Group Materials and Characterisation Group Mathematical and Theoretical Physics Group Medical Physics Group Molecular Physics Group	Nanoscale Physics and Technology Group Neutron Scattering Group Nonlinear and Complex Physics Group Nuclear Industry Group Nuclear Physics Group Optical Group	Particle Accelerators and Beams Group Physical Acoustics Group Physics Communicators Group Plasma Physics Group Polymer Physics Group Printing and Graphics Science Group
Q	**S**	**T, V, W**
quantum Business Innovation and Growth (qBIG) Group Quantum Electronics and Photonics Group Quantum Optics, Quantum Information and Quantum Control Group	Semiconductor Physics Group Shock Wave and Extreme Conditions Group Structural Condensed Matter Physics Group Superconductivity Group	Theory of Condensed Matter Group Thin Films and Surfaces Group Tribology Group Vacuum Group Women in Physics Group

More information about each of the groups can be found at iop.org.

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