2025 Statements of Service

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on behalf of ePIC Membership Committee

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ePIC Membership Policy: where are we? (I)

discussed and debated during Q1+Q2 2024
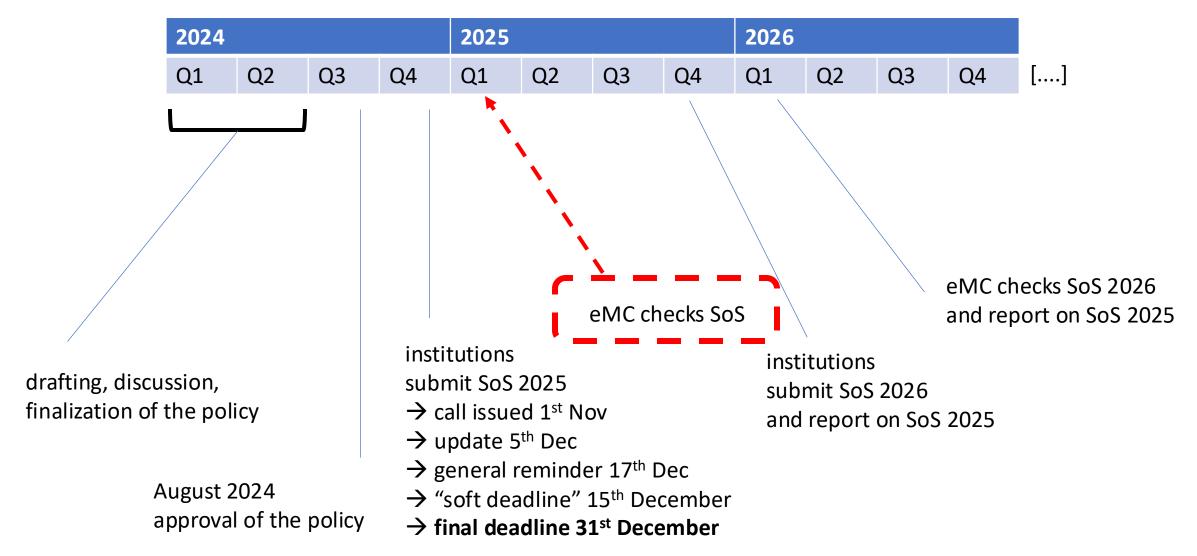voted by the CC during July/August → approved August

Zenodo link to the policy: https://zenodo.org/records/13693927
(you should be on Zenodo, but if you are not here a courtesy Google link)

key elements

- establish rules for institutions and members to gain/maintain signing/authorship status
- establish mechanism to collect committments by institutions for the upcoming year ("Statement of Service" - SoS)
- establish a mechanism to review the SoS → evaluate if everything ok
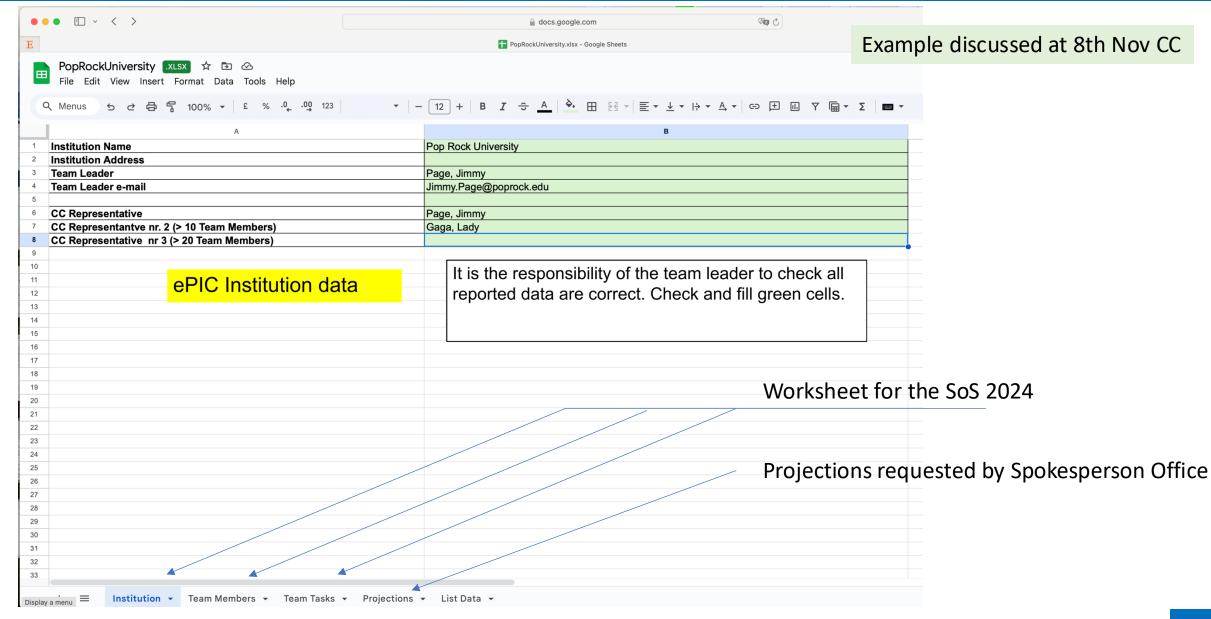
ePIC membership policy: where are we? (II)

2024				2025				2026				
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	[....]

eMC checks SoS

eMC checks SoS 2026
and report on SoS 2025

institutions
submit SoS 2025
→ call issued 1st Nov
→ update 5th Dec
→ general reminder 17th Dec
→ "soft deadline" 15th December
→ **final deadline 31st December**

institutions
submit SoS 2026
and report on SoS 2025

drafting, discussion,
finalization of the policy

August 2024
approval of the policy

This is a **bootstrap** year!

Data collected via GoogleSheets

Example discussed at 8th Nov CC

ePIC Institution data

It is the responsibility of the team leader to check all reported data are correct. Check and fill green cells.

Worksheet for the SoS 2024

Projections requested by Spokesperson Office

ePIC membership policy: where are we? (III)

- as of 1st January 41 institutions out of 178 didn't fill the required data
- eMC co-chairs and then eMC members nudged/further contacted "missing" institutions with individual mails
- eMC members currently also checking all SoS for inconsistencies and/or partial missing information
- as of 22st January (1:00 AM - EDT) 23 institutions still completely missing (13%) [List of "empty SoS institutions" in backup please double check and contact us in case!]
- very few institutions communicated decision to withdraw from ePIC (just no longer individuals interested on ePIC i.e.: Hebrew University, National Cheng Kung University) → routed to management

In the next slides:

- incomplete preliminary analysis of aggregated data
- common "issues" and some points of discussion for the CC
- next steps

from the data so far...

ePIC: 178 Institutions → data from 154 institutions

655 authors / 970 members = 67%

243.76 FTE @work in 2025!

(73 invalid/empty ePIC entity/task to be fixed in various workbooks...)

756 individuals on detectors (176.4 FTE)

136 individuals on physics (23,09 FTE)

are we "balanced"?

from the data so far...

HERE PETER TO ADD CHARTS

common issues / some points of discussion

- missing ORCID (especially for technicians and engineers)
  - ➢ strongly recommended to include all ORCID (ask people to register), however not strictly necessary (a workaround will be identified)

- understanding 0.15 rule:

$$\frac{\sum_{k=1}^{N_{members}} (FTE)_k}{N_{authors}} \geq 0.15$$

Sum FTE over all your members and divide just for the authors!

- some tasks don't have a fitting ePIC entity (like "local group management") and BNL/JLAB are unsurprisingly special
  - ➢ to be added some additional ePIC entity/task consolidating data

common issues / some points of discussion (II)

- some institution filled the workbook with members but without authors and it is not committing any FTE on any task
  - ➢ as per Membership policy they will be members without authorship, ok
  - ➢ this is ok in a bootstrap year/initial phase but not tenable on the long run
  - ➢ they will show up in Collaboration list, info on web page etc. but not in author list in papers etc.
  - ➢ what about the right to vote in the Collaboration Council?

next steps

- eMC will continue to work with Team Leaders / CC reps during coming month to fix missing data, check minor inconsistencies, etc.

- eMC will "freeze" SoS once fully ok and we will notify institution everything ok (as a rule of thumb: if you have not been contacted since January you are ok...)

- behind the scenes work is going on to feed ePIC database ("phonebook") with collected data: this will in turn manage access to ePIC "resources" (to start with: general mailing list, Indico, etc.) → BNL developer(s) working on it (coordinated by Peter/Thomas)

Very important note: an institution failing to provide any feedback/reaction to the (many, at this point) SoS request will be de-facto out of ePIC soon (one/two months). Such institution will be formally notified a last time when this will happen.

Conclusions and outlook

- SoS are coming! Challenging exercise ("first time") but we are converging
- Expectation by end of February of having consolidated database and agreed SoS
- Full analysis to be presented then at CC
- the first year exercise has been a learning exercise for all. Besides technical things to be fixed, CC might consider to give guidance on how to treat specific issues emerged through the exercise during coming years

Backup

ePIC Membership Policy: some excerpts

1. ePIC membership policy scope

This policy defines the process, immediately following admission to the ePIC Collaboration, in which an institution and its members establish and maintain the status of "signing institution" and "author", respectively (referred to in ePIC Charter v1.0, section 4.3 as "institution in good standing" and "member in good standing" -- we henceforth replace those terms with the new language here.).

Individual authorship (i.e. being designated an author) is a precondition for inclusion in paper author lists and for eligibility in leadership positions. Authorship also requires membership in a signing institution.

2. Annual statement of service

Continued authorship in the ePIC Collaboration requires membership in a signing institution and inclusion in an annual institutional "statement of service".

The annual statement of service is intended to reflect institutional commitments for the coming year, and document contributions to ePIC carried out during the previous year. It is expected that the majority of institutions will maintain signing status, once obtained, while they are active members of ePIC. Exceptions to this are detailed below in Section 4.

The institutional CC representative(s) are responsible for completing and submitting the statement of service. The eMC will issue the call for submission after discussing it with the CC Chair and at least two months prior to the submission deadline. The eMC will be in charge of signing off on the statement after an appropriate review, also as described in Section 4.

Maintaining the signing status of an institution will require substantial contributions to ePIC -- at the present time in the form of service work towards detector development, physics studies, computing infrastructure, or other Collaboration work. In the current policy, the total contributed work from an institute must equal or exceed 0.15 FTE (averaged over a year) per group member with authorship status. The policy is expected to evolve throughout the different ph

List of institutions with "empty" SoS so far

Institution	Notes
Christopher Newport University	
Columbia University	
Dr. B.R. Ambedkar National Institute of Technology Jalandhar	
Egyptian Center for Theoretical Physics	
Hanyang University	
Institute of Physics, Academia Sinica	
Lancaster University	
Lehigh University	
National Central University	
National Cheng Kung University	only individual moved to Academia Sinica, this institution is withdrawing from ePIC
Ohio University	
Pacific Northwest National Laboratory	
Taras Shevchenko National University of Kyiv	Mail exchanged they can't very understandably commit for 2025 tasks.. for the moment
Tel-Aviv University	
Temple University	In contact, will do soon
Tsinghua University	
University of California, Berkeley	In contact, will do soon
University of California, Davis	
University of New Hampshire	
University of North Georgia	
University of Oxford	
University of South Carolina	
University of Virginia	
Yonsei University	

PLEASE DOUBLE CHECK AND CONTACT eMC IF WE ARE MISSING SOMETHING!