

ePIC Membership Policy
DRAFT v0.9

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 “good standing” (ePIC Charter v1.0, section 4.3).

Individual good standing is a precondition for authorship and for eligibility in leadership positions. Individual group standing also requires that one’s institution be in good standing.

Institutional good standing requires the annual collection and review of information about an institution’s members and their contributions to ePIC. This information will typically be utilized to ensure continuation of good standing for the institution. When exceptions arise, the ePIC Membership Committee (“eMC” hereafter) will provide relevant information to the ePIC Collaboration Council (“CC” hereafter) for subsequent deliberations.

Individual good standing is envisioned by the charter as a one-time separate process requiring - specifically for authorship - an identifiable contribution of ePIC service work in addition from each individual (ePIC Charter v1.0, section 4.5). In the current stage of the experiment, this is reduced to a more generic contribution to the experiment. However, the Collaboration should expect the policy to evolve to something more substantive in the future.

This policy is intended to be revised as the ePIC Collaboration evolves, and the current version should be reviewed and updated no later than March 2026.

2. Annual statement of service

Continued good standing in the ePIC Collaboration requires membership in an institution in good standing 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 good standing, once obtained, while they are active members of ePIC. Exceptions to this expectation 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.

The statement of service is required to include:

- 40 A. A list of all institution members: name, current position, and commitment to ePIC in units
41 of full-time equivalent (FTE) per year and whether they need individual good standing
42 B. Association of each member to specific activity areas, where “activity areas” are any
43 officially approved activity (detector, computing, physics, other WGs) within the
44 Collaboration and provided in the existing ePIC organigram. Activities are expected to
45 be added and removed from the ePIC organigram as the Collaboration evolves, and
46 should be updated in new statements as needed.
47 C. A brief comment and FTE declaration for each member’s contributions to their specific
48 activity area(s) since the last statement of service submission
49 D. A brief comment and FTE estimate for each member’s plans to contribute to their
50 specific activity area(s) over the next year.

51 3. Initial institutional good standing

52 Upon ePIC formation, all groups were given good standing pending a first review. Approval of
53 this policy will trigger the solicitation of institutional statements of service and subsequent
54 review. This process is expected to be completed within one year following the approval
55 meeting.
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57 New groups will be admitted as a member institute without good standing (with their members
58 ineligible for ePIC authorship, talks, and leadership positions). An institution will obtain good
59 standing based on an initial review of its proposed institutional commitment, typically after 6
60 months (a duration which can be shortened with eMC approval) and then only upon request by
61 their institutional CC representative(s). After this, they follow the normal annual ePIC review
62 process. The request for institutional review for good standing can be deferred, but only up to 3
63 years after joining ePIC. If the review of an institution is not successfully completed by that
64 time, the eMC will refer the matter to the CC.

65 4. Maintenance of institutional good standing

66 Maintaining the good standing of an institution will require substantial contributions to ePIC -- at
67 the present time in the form of service work towards detector development, physics studies,
68 computing infrastructure, or other Collaboration work. In the current policy, the total contributed
69 work from an institute must equal or exceed 0.2 FTE (averaged over a year) per group member
70 in good standing. The policy is expected to evolve throughout the different phases of the ePIC
71 experiment (design, construction, and operations), so this threshold may be higher in the future,
72 and include specific service requirements, e.g. for experimental shifts. In general, the
73 institutional contributions for a given period (typically a year) should be commensurate with the
74 institutional commitment plan of the previous year.
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76 Some members of any particular group may not need to become members in good standing,
77 e.g. undergraduate students or technical staff. Those contributions are credited toward the total
78 FTE for an institution while not increasing the number of members in good standing. Thus, they

79 effectively reduce the contributions needed by other members of their group to comply with the
80 overall 0.2 FTE requirement.

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82 Starting in 2025, one year after the expected approval of this policy, the eMC will organize
83 annual reviews of institutional statements of service, which reflect contributions over the
84 previous year and the work planned for the upcoming year. The eMC is responsible for signing
85 off on the statement of service, with help from individual “activity coordinators” (defined as the
86 set of DSLs and working group conveners) -- both to assess individual contributions from the
87 previous year (as discussed below in Section 5), and plans for the coming year. To aid in this
88 process, and to provide accurate information at the end of the year, activity coordinators are
89 encouraged to keep track of individual contributions on a regular basis.

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91 While most contributions to institutional good standing stem from the work of institute members,
92 institutions also have substantial responsibilities to the ePIC Collaboration through their
93 institutional CC representative(s), e.g. attendance at CC meetings and voting in CC elections.
94 To emphasize the importance of this work, suspension of an institutes’ CC vote (as outlined in
95 ePIC Charter v1.0, section 5.3, based on lack of participation) can serve as the basis for an
96 institution to have its good standing suspended.

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98 If the outcome of an annual review leads the eMC to conclude that an institute’s good standing
99 could be suspended, the procedure is as follows:

- 100 A. The eMC will discuss the situation with the relevant CC member(s). Ideally, modest
101 changes in the group’s commitments to ePIC (and competing non-ePIC efforts) can be
102 made to bring the group’s commitments in line with their available workforce.
- 103 B. If a viable plan cannot be worked out, then the eMC escalates the issue to the ePIC
104 spokesperson for further discussion.
- 105 C. If there is still no agreed-upon solution, then a proposal to suspend good standing is
106 brought to the CC Chair by the eMC and ePIC management.
- 107 D. Upon decision by the CC, the eMC implements the loss of status within the ePIC
108 organization, i.e. by updating the relevant databases or lists. All members of an
109 institution having its good standing suspended necessarily will have their individual good
110 standing suspended as well (ePIC Charter v1.0, Section 4.3). For those individuals
111 holding good standing upon suspension of the institutional good standing, their individual
112 good standing will be restored when institutional good standing resumes.

113 5. Role of individual contributions to institutional good standing

114 Individual contributions to a given institution primarily serve as the basis for the annual
115 institutional review. These individual contributions are specified in the institutional statements of
116 service, and the eMC should solicit input from relevant ePIC activity coordinators to assess
117 them, e.g. based on posted talks and notes. Activity coordinators may also delegate this role to
118 colleagues with appropriate expertise.

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120 If an individual with good standing moves to an institution also in good standing, their standing
121 transfers to the new institution. If they move to a newly-admitted institution without good
122 standing, they can retain their status for up to one year, associated with their previous affiliation
123 until the new institution achieves good standing. If they leave the ePIC Collaboration altogether,
124 they retain their standing for one year, associated with their previous affiliation. It is the
125 responsibility of the institutional CC representative(s) to alert the eMC in a timely fashion when a
126 current ePIC member leaves their institution.

127 **6. Obtaining and maintaining individual good standing**

128 Individuals become members of ePIC upon being registered with the Collaboration by their
129 institutional CC representative. Upon registration, each member has the rights of membership
130 without good standing, as stated in the ePIC Charter v1.0, Section 4.4.

131
132 Upon approval of this membership policy, all current members of ePIC will be given good
133 standing. Collaborators joining after that date can obtain good standing upon completion of an
134 initial period of membership that contributes to the success of the ePIC Collaboration. This initial
135 period of membership is expected to be at least 6 months of engaged participation and
136 contribution to ePIC, but shorter durations can be envisioned during the early phases of the
137 experiment. At the end of the 6 month period (or earlier, if an exception is granted by the eMC),
138 the institutional CC representative(s) should ask the eMC to review the individual's contributions
139 and their plans for the upcoming year, in consultation with the appropriate activity coordinators.
140 The approval of the eMC is then sufficient to allow the individual to become an individual in
141 good standing.

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143 **7. Evolution of institutional commitments**

144 The ePIC Collaboration generally expects institutions to sustain contributions to their declared
145 activity areas over multiple years.

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147 However, it is understood that institutional commitments may evolve as institutions change in
148 composition (gain/loss of students, engineers, etc.) and tasks are completed or evolve (e.g. as
149 ePIC moves from construction to detector commissioning).

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151 Consideration of these changes will be reflected in the annual review process involving ePIC
152 management, as needed.

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154 **8. Membership withdrawal for institutions**

155 A member institution choosing to withdraw from the ePIC Collaboration must communicate their
156 intent in writing in a timely way to the ePIC Spokesperson, eMC chair and CC chair.

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158 The departing institution is expected, however, to make its best efforts to fulfill the institutional
159 commitments enumerated on its last submitted annual statement of service.

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161 In order to allow for the completion of ongoing scientific work, institutional good standing is
162 maintained for one year after it has notified its intention to withdraw from the Collaboration.

163 Similarly, individual good standing is extended to all of the group's members who had good
164 standing at the time of the departure. This allows the institution and its members to remain on
165 scientific and technical papers released during this period.