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

drafting, discussion, finalization of the policy

August 2024 approval of the policy

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

eMC checks SoS 2026 and report on SoS 2025

Please keep in mind that 2025 is a **bootstrap** year: the review of the previous year only starts in 2026

Data collected via Google Sheets

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
  - *Some institutions didn't fill FTE or author fields*
  - *Please respond to these requests! (we started this process 1st November)*
- as of yeterday (6:00 PM, CET) 20 institutions (12% of total) have empty sheets
  - *Current list is in backup: please double check and contact us in case of a misunderstanding*
- A few institutions communicated their decision to withdraw from ePIC
  - *Referred to management for further discussion (eMC is not in charge of institutions leaving ePIC)*

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

668 authors / 985 members = 67%

237.88 FTE @work in 2025!

(73 invalid/empty ePIC entity/task to be fixed in various workbooks, several sheets without FTE...)

756 individuals on detectors (176.4 FTE)
136 individuals on physics (23.1 FTE)

are we "balanced"?

Individuals

Detector 756.0

S&C 74.0

TIC 34.0

Physics WG 136.0

Management 39.0

FTE

Detector 176.0

S&C 12.0

TIC 9.0

Physics WG 23.0

Management 5.0
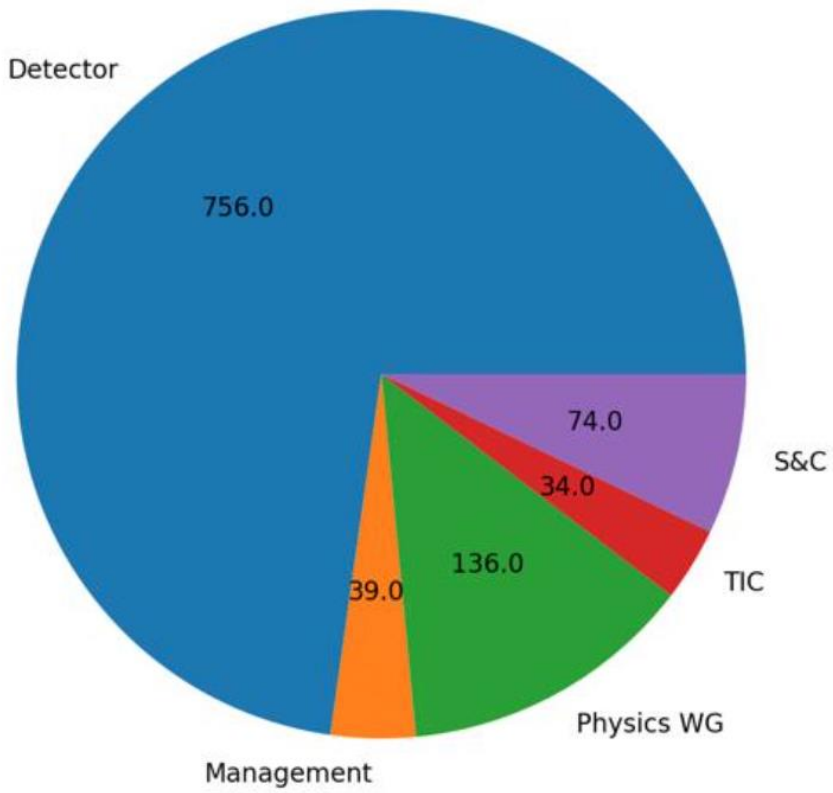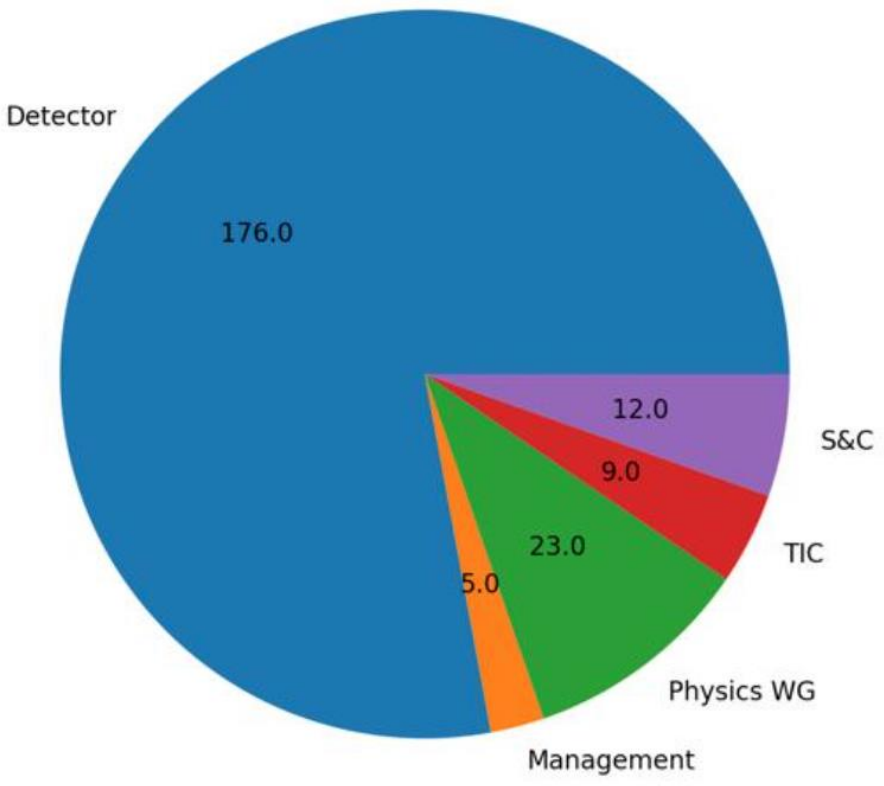
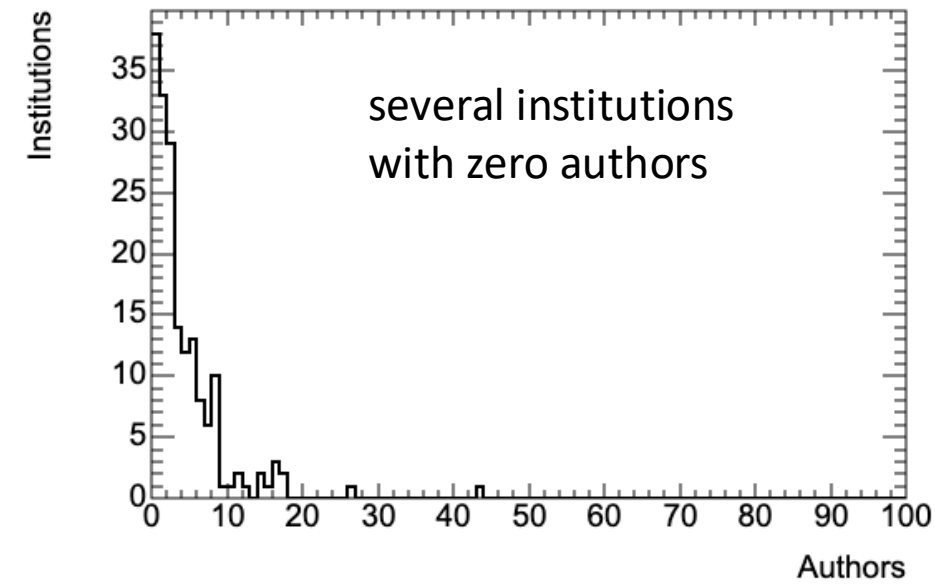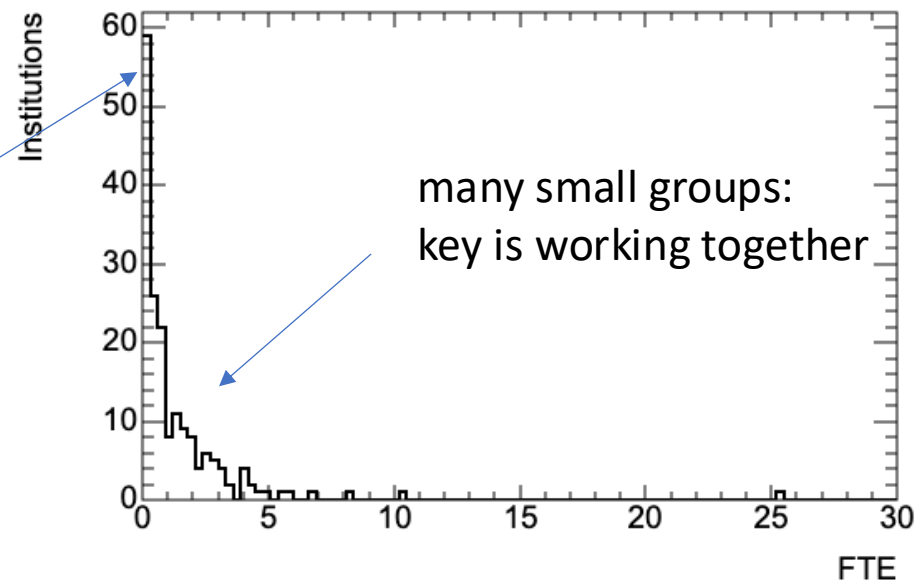balancing the pie...
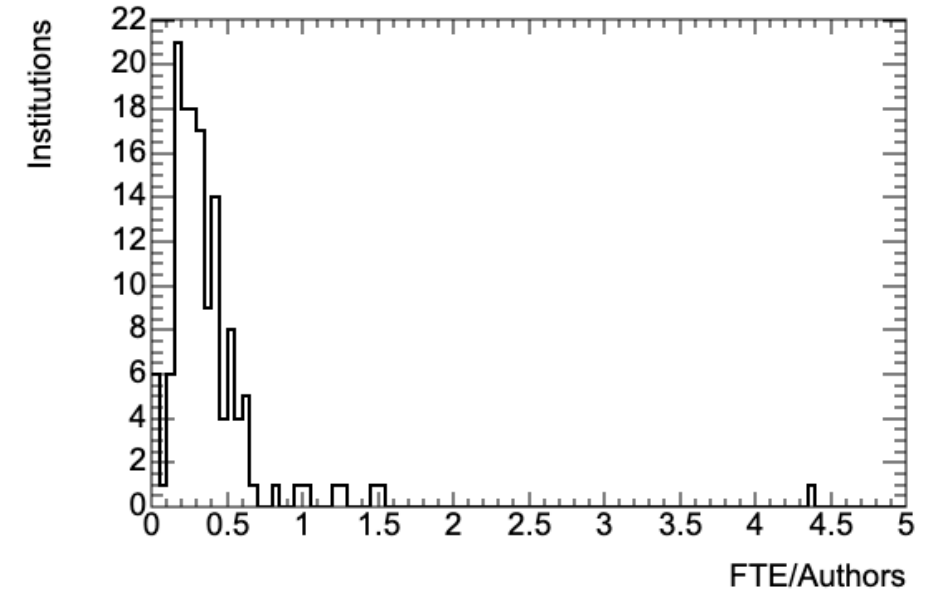
first bin with zero
are the "empty" SoS
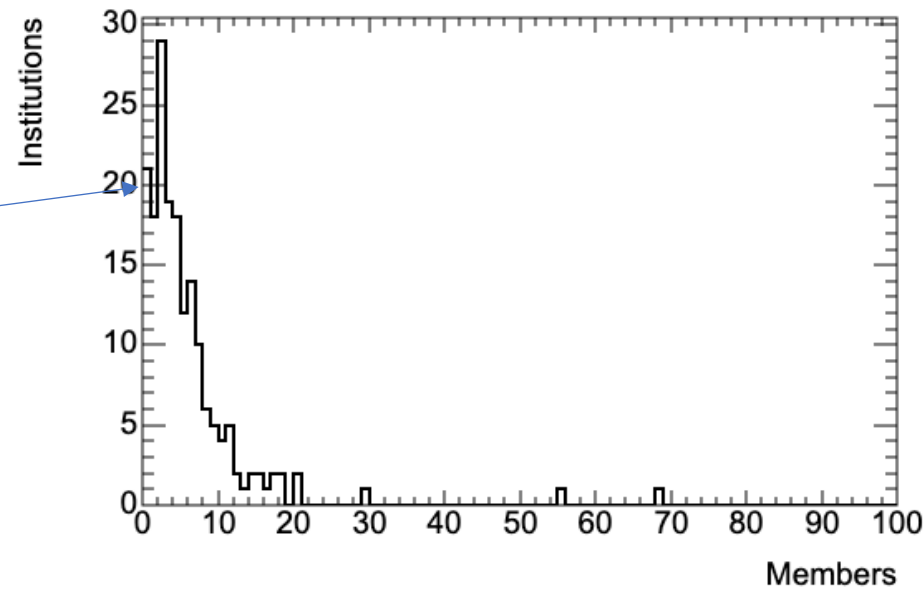
several institutions
with zero authors

we have quite
a number of institutions
with zero FTE

many small groups:
key is working together

common issues / some points of discussion

- missing ORCID (especially for technicians and engineers)
  - ➢ eMC strongly recommends providing ORCID for all members
  - ➢ ePIC management policy is that it is not strictly necessary
    - ➢ Should eMC obtain ORCIDs for colleagues based on name/institution/email information?

- 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 have project-adjacent work that is not yet represented
  - ➢ 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
    - without committing any FTE on any task
- Current understanding/points of discussion
    - According to membership policy they will be members without authorship
    - This is ok in a bootstrap year/initial phase, but is not tenable on the long run
    - These institutes will show up in Collaboration list, info on web page etc. but not in author list in papers etc.
    - How should this affect Collaboration Council voting privileges?

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 developers team working on this (coordinated by Peter/Thomas)

Very important note:
an institution failing to provide any feedback/reaction to the SoS request will be <u>de-facto out of ePIC soon (in one or two months)</u>.

Institutions will be formally notified one last time before this happens.

Conclusions and outlook

- ## Most SoS are in hand!
  - It was a challenging process, but we are converging
- ## By end of February, expect a consolidated database with finalised SoS
  - Full analysis to be presented then at CC
- ## This has been a learning exercise for everyone involved.
  - 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	on contact, for the moment they plan working on accelrator components only TBD
Lehigh University	
National Cheng Kung University	only individual moved to Academia Sinica, this institution is withdrawing from ePIC
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 North Georgia	
University of Oxford	
University of Virginia	
Yonsei University	

(as of a check done 22 Jan at 6:00 PM CET....)

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