

SPECIAL INTEREST GROUPS



POLICY PAPER

2021

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What are SIGs

“EARLI aims to promote and support research initiatives between internationally active researchers, and between both established senior researchers and emerging juniors. One of the main goals of EARLI is to encourage communication and fruitful exchange between researchers in the form of Special Interest Groups (SIGs).

”

EARLI currently supports 26 *Special Interest Groups*, representing a wide variety of topics related to Learning and Instruction.

An EARLI Special Interest Group is formed in order to study **one or more parts and / or aspects of the field of Learning and Instruction** more specifically, as well as to give substance to themes of research within the Association. SIGs are the scientific backbone of EARLI, in which scientific quality is most clearly represented and in which scientific progress and innovation are most prominent.

Existing active SIGs which consistently show their scientific quality have the potential to bring forward EARLI as a vivid research society. EARLI has an attitude to support the maintenance and foundation of SIGs in their engagements with **new and important aspects of research on learning and instruction**.

EARLI currently supports 26 Special Interest Groups, covering a wide range of topics in the field of learning and instruction.

A full list of SIGs can be found on the EARLI website (www.earli.org/SIG).

**“SIGS ARE THE SCIENTIFIC
BACKBONE OF EARLI.”**

Should you feel a certain topic is not represented within the current offer-ing, it is possible to found a new SIG (cfr. “SIG Procedures”).

Each SIG is governed by two SIG Coordinators and one JURE Coordinator, who are responsible for the organisation of SIG activities and the financial management of the SIG (cfr. “SIG Positions”).

SIG procedures

“ This section describes the various procedures involved in the management of the EARLI Special Interest Groups and their activities: how to found a SIG, how to make sure your SIG remains an active and innovative research group and how a SIG can be dissolved or encouraged to re-orientate. The functioning of the SIGs, their coordinators and their respective rights and obligations are further detailed in this document (cfr. SIG Positions).

”

FOUNDING

A new SIG can be installed by the Executive Committee, either on the Committee's own initiative or on the initiative of **at least thirty members**.

To apply for the founding of a new SIG, please send a **proposal** by e-mail to the EARLI Office including the information in the next column.

The EARLI Office will present this proposal at the next meeting of the Executive Committee of EARLI. These meetings are held twice a year, in October and March. The EC will evaluate the proposal and take the **final decision**, after which the EARLI Office will inform the applicants of the decision.

Once a new SIG is founded, one of the two first Coordinators will serve for six years while the other will be replaced after four years. In this way it is possible to form a **continuum** where only one Coordinator is changed every two years.

The founding SIG Coordinators may decide which one of the two will serve as the coordinator for four and which one for six years.

1

A **mission statement** (max. 500 words) with a clear profile description of the new SIG, including the identity, aims and scope of the SIG.

2

A short **curriculum vitae** of the two SIG Coordinators who are willing to start the SIG. These Coordinators have to represent different countries and at least one of them must work in Europe. They must also have been an EARLI member for at least four years.

3

An overview of **SIG activities** to be organised in the future and an overview of **prior activities** in the theme of the proposed SIG to show its relevancy to EARLI (E-CER, EFG or EARLI symposia, ..).

4

A description of **possible complementary connections** to existing SIGs and Emerging Field Groups (EFGs).

5

A list of at least **30 EARLI members** who intend to join the SIG.

SIG criteria

The criteria described below are required for EARLI SIGs to take into consideration when planning their activities. Each SIG will be asked to submit an annual report, in which they demonstrate which criteria they have been working on during the past year. The EARLI EC will use these reports to evaluate each SIG. Should these criteria not be met sufficiently, the EARLI EC could decide to dissolve the SIG, ask to re-orientate their activities or suggest to evolve into a different type of research group.

ORGANISE

Each SIG is expected to undertake a minimum number of mandatory actions to ensure a healthy flow of activities for its membership:

- 1** Host at least **one SIG activity** in the year in between EARLI Conferences (SIG Meeting, Conference, Monthly newsletter, ...).
SIGs are encouraged to organise multiple activities to allow for a diverse offer of activities to its members.
- 2** Hold a **SIG Members' Meeting** during the Biennial EARLI Conference, for which the agenda is communicated to all SIG members at least one month before the meeting.
- 3** Ensure a steady number of **SIG members** with a minimum of 30 members per year.

CONTRIBUTE

Each SIG is also required to contribute to initiatives hosted by the Association, most notably to the Biennial EARLI Conference:

- 1** Propose **keynote speakers** for the Biennial EARLI Conference. Each SIG will be contacted by EARLI Office during the preparations of the Conference.
- 2** Nominate SIG members and Coordinators to act as **reviewers** for the Biennial EARLI Conference.
- 3** Organise a **SIG Invited Symposium** at the EARLI Biennial Conference. The SIG Coordinators are responsible for the organisation of this symposium.

SIG criteria

Most importantly, EARLI wishes to encourage SIGs to invest in innovation. Any of the following criteria can help SIGs to establish themselves as contributors to the innovative nature of the Association.

INNOVATE

- 1** SIGs are invited to experiment with **new approaches** to their activities, such as the use of new media or proposing alternative, new types of SIG activities.
- 2** In order to support the contributions of their own membership, SIGs can award “**SIG Recognitions**” either during their conferences or to reward outstanding contributions to the field of interest represented by the SIG. *
- 3** EARLI also encourages SIGs to try to reach a **diverse group of members**, consisting of both Senior and Junior researchers, representing different nationalities.
- 4** SIGs are also supported in initiating **collaborations** between SIGs, other research groups or even partners external to EARLI. Further advice or information can be obtained by contacting the EARLI Office.
- 5** SIGs are equally encouraged to organise **new types of SIG activities**, different from the existing offering of activities.
- 6** SIGs are also asked to contribute to the broader **visibility of EARLI** as much as possible. EARLI provides a set of social media guidelines to help SIGs in using these channels to the fullest of their potential. The new EARLI website also offers SIG Coordinators the opportunity to manage their own SIG webpage to disseminate information and calls concerning their SIGs. The EARLI Mailchimp tool also offers the opportunity to easily communicate with the SIG membership.

*** SIGs are asked to use the term “SIG Recognition” instead of SIG Award, in order to sufficiently distinguish them from the EARLI Awards, granted during the EARLI Conferences.**

SIG positions

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Each SIG is governed by two SIG Coordinators, assisted by a JURE Coordinator. All EARLI members with a minimum period of four years of membership, and established research experience documented by a record of publications in a field of relevance to one of the Special Interest Groups, are eligible to stand for election as SIG Coordinator.

”

JURE

SIGs are required to appoint a JURE (Junior Researcher) Assistant Coordinator to help with the organisation of activities for a SIG:

- 1** A JURE Assistant Coordinator can be appointed or replaced only in **uneven calendar years**, i.e. the years linked to the EARLI Biennial Conference.
- 2** The JURE Assistant Coordinator should be a **member of JURE** at the start of his/her term and should stay on for a minimum of two years and a maximum of four years.
- 3** The JURE Coordinator **assists** the SIG Coordinators in their activities.
- 4** SIG Coordinators can disseminate a **call for candidates** to JURE members and should manage the procedure of selection and appointment.
- 5** **Elections** need to be organised well ahead of the EARLI Conference; EARLI can provide the Coordinators with a voting system.
- 6** Only **one JURE Assistant Coordinator** can be appointed at any time.

SIG

COORDINATOR

A Coordinator of a Special Interest Group has to uphold important responsibilities that include:

- 1** Taking a **leadership** role to further develop your SIG.
- 2** Serving as a liaison and a **communication channel** between the members of the SIG, the EARLI Executive Committee and the rest of the EARLI community.
- 3** Organising **SIG activities**, such as seminars, newsletters or publications, consistent with the EARLI scientific mission and strategy.
- 4** Monitoring the **financial situation** of the SIG and the financial balances of the activities.
- 5** Liaising with the EARLI Office to organise the **SIG Coordinator elections** well ahead of the Biennial Conference, using the online voting system provided by the EARLI Office.
- 6** Composing an **annual report** of activities including a list of participants for each activity.
- 7** Act as a **reviewer** for the EARLI Publication Award (which is announced during the Biennial EARLI Conferences).
- 8** **Stimulate activity** on the EARLI website, and through social media (e.g. SIG twitter account). Social media guidelines will be provided for the SIGs.

The SIG Coordinator plays a unique role in ensuring the development of the SIG.

SIG sup port

“

The EARLI Executive Committee and EARLI Office aim to support SIGs in the organisation of their activities. The section below describes all the ways in which EARLI offers support to SIGs.

”

EARLI OFFICE

The EARLI Office is committed to support SIGs in the organisation of their conference, in various ways:

1

The EARLI Office can guide each SIG through every stage involved in their Conference organisation: from selecting a good location, to mapping out the preliminary budget, and attracting participants.

2

The newly developed **Conference Management System** is available for use by each SIG, with additional technical support provided by EARLI Office, in the form of helpdesk.

3

Each SIG in need of financial support can also apply for the **SIG start-up fund**, to cover initial costs. This amount is limited to a maximum of € 2.000 per SIG and should be paid back to EARLI should the Conference be profitable.

The system, which has been fully renewed in 2016, is flexible up to a certain level and can be adjusted to specific conference requirements. A **manual** for the use of the Conference management system is available upon request. SIG Coordinators will need to appoint one person who takes responsibility for the management of the conference system for a period of about 12 months straddling the conference.

“The Conference Management System will be offered free of charge to all SIGs”

Each SIG can also update their own SIG webpage on the EARLI website, through the use of a SIG specific login.

Additionally, SIGs can host a Conference website within the EARLI website, in the form of a One-Pager. Using the EARLI website will also allow for SIGs to publish a dynamic version of their Conference programme directly on their website.

CONFERENCE MANAGEMENT SYSTEM

The newly developed EARLI Conference Management System has been rolled out for use to each SIG. This system has been developed with the particular needs of SIGs in mind, and offers flexibility to set-up an online Conference tool tailored to your needs.

EARLI offers two Conference Support Services, depending on your SIG's specific needs and the level of support offered by EARLI Office (see next page). Choose the service which is best suited to your SIG or get in touch with EARLI Office with any questions you might have. Please be advised that, although both services are offered for free, some additional running costs will be charged to your SIG.

After providing the basic information about your Conference, EARLI Office will arrange the initial set up of the Conference tool for you. You will then be offered partial admin rights, allowing you to manage and follow up each aspect of your SIG Conference.

Through an extensive manual complete with online tutorial videos, you will be guided through each of the steps involved in managing your Conference. Additionally, EARLI Office remains available for support and helpdesk should you experience any difficulties throughout the process.

1

SUBMISSION AND REVIEW

This elaborate tool allows your SIG members to submit their preferred submission type directly into the system. Submission types can be defined and adapted to each individual Conference. The tool also allows for Invited Sessions which bypass the review flow and are immediately accepted. The automatic matching tool will link each proposal automatically to the best suited reviewer, based on shared keywords, SIG and domain.

2

REGISTRATIONS

This tool allows your Conference participants to register for the Conference, purchase additional tickets (dinners and lunches) and join your SIG as a member.

3

CLUSTERING and SCHEDULING

Thematically cluster individual presentations together and automatically allocate them to a timeslot. This allows your SIG to generate the best possible Conference programme, taking into account parameters such as session popularity, room capacity and presenter availability.

Below, you can find an overview of both Conference System Services provided by EARLI. Depending on the tools you need, the amount of financial support and the support from EARLI Office, each SIG can select the service which is best suited to their specific needs.

	STANDARD SERVICE	PRO SERVICE
Application Tools		
Submission and Review	√	√
Registrations	-	√
Clustering and Scheduling	-	√
Mobile app	-	√
Financial Support		
Monthly Transfer of Income	-	√
Financial follow-up (invoice requests, processing of bank transfers, ...)	-	√
EARLI Support		
Application set-up	√	√
Manual and tutorials	√	√
Helpdesk	√	√
IT Costs		
Hosting	€ 34,00	€ 34,00
SLA One Agency	€ 75,00	€ 75,00
Clustering	-	€ 0,60 / submission
Scheduling	-	€ 3,00 / timeslot
Mobile app	-	€ 5,00 / device
Financial Costs		
Fixed Bank Cost (on total CC transactions)	-	1,8 % of total
Fixed Bank Transfer Cost (per BT transaction)	-	€ 10,00 / transaction
Ingenico Subscription Cost (one year)	-	€ 25,00
Single Ingenico Cost (per CC transaction)	-	€ 0,33 / transaction
Total Ingenico Cost (on total CC transactions)	-	0,36 % of total
TOTAL (in €)	€ 109,00	€ 134,00 (+ variable costs)

The costs involved in the use of the Conference system will be charged to each SIG, or deducted from the Conference income (PRO Service).

For an average SIG Conference (88 submissions, 100 participants and average Conference fee of € 300,00) these variable costs amount to around € 1.000,00.

FINANCIAL SUPPORT

EARLI provides a **start-up funding** budget for SIG activities, consisting of € **2.000,00** per two year cycle.

By providing this start-up funding, EARLI hopes to offer SIGs and the organisers of SIG activities a certain financial buffer and eliminate the financial risks involved in hosting a SIG Conference.

This start-up funding is primarily aimed to help SIGs cover the initial costs of their Conference before any Conference income is available. Therefore, the funding application should be submitted to the EARLI Office at least **4 months prior** to the conference.

Therefore, the SIG start-up funding should be considered as a loan. Should a SIG Conference make a loss, this sum can be used to cover the loss. Similarly, should the SIG Conference make a profit, this start-up fund should be paid back.

In order to implement a payment, the EARLI Office has to be supplied with the following bank details:

IBAN number

BIC code

NAME of the Account Holder

Contact the EARLI Office to obtain a budget template, contract templates

and further information with regards to the start-up fund.

The funding will be paid by the EARLI Office after the SIG activity has taken place and upon receipt of the **SIG Coordinators' report**.

This report should include a **list of the participants**, indicating who is an EARLI or SIG member. If pre-payment is needed, EARLI can pay a maximum of 50% in advance. The remaining amount will be paid upon receipt of the report.

The SIG Funding request should at least include the following elements:

- 1** Information about the **nature, goals and aims** of the activity and the **preliminary programme** (invited speakers, submission formats, etc...).
- 2** The expected number of **participants** and / or the number of **submissions** received.
- 3** A **preliminary budget** showing the estimated income and expenses of the event, as well as the costs for which the start-up funding will be used.
- 4** An **open call** for participation, which can be sent to all EARLI members.

The funding request should be submitted to the EARLI Office by one of the SIG Coordinators and it should take into account the following rules:

- 1** A **meeting** of the two SIG Coordinators cannot be considered for funding.
- 2** Any activity taking place **du-ring the year of the Biennial EARLI conference**, including the members meeting, cannot be considered for funding.
- 3** Should the SIG activity include a **registration fee** (e.g. for a conference), a reduced registration fee should apply for EARLI and JURE members.
- 4** This reduced rate should be **no more than 80%** of the fee charged for non-EARLI participants.

- 5** The EARLI Executive Committee highly recommends SIGs not to charge more than **€ 300,00** for EARLI members.
- 6** If the SIG activity generates any **profit**, SIGs should use this budget to reinvest in the organisation of future SIG activities (after paying back the initial start-up funding). It is the responsibility of the SIG Coordinators to monitor the financial situation.
- 7** The sponsored SIG activity must take place within **Europe** (including Israel).
- 8** **Joint SIG activities**, co-organised by more than one SIG, can receive a maximum support of **€ 4.000,00**. In this case, SIGs should submit a joint funding request.

Budget Management

The SIG Coordinators are responsible for the **budget balance**. This balance should be confirmed and approved by the SIG members during the SIG Members' Meeting every year. In order to secure the continuity of the SIGs financial situation, EARLI offers the possibility to **safeguard** the balance

SIG's balance with EARLI. This safeguarded balance can be used for future SIG activities. The SIG Coordinators stay completely autonomous and can request at any time the financial overview of their SIG. For more information, please contact EARLI Office.

FINANCIAL FOLLOW-UP

Additional to the start-up funding offered to SIGs, EARLI Office can also be contacted for financial follow-up, such as an elaborated **budget template** which can help your SIG make a realistic financial forecast, as well as monitor the financial status of your SIG activity throughout the organi

process. For SIGs using the Conference Management System, this financial follow-up also includes processing and handling invoice requests from SIG participants, arranging refunds, processing bank transfer payments (incl. following up on partial or failed payments).

ELECTIONS

SIG Coordinators are responsible for the continuity of their SIG and are in charge of organising elections to find a suitable successor. The **election procedure** should be started up well ahead of the Biennial EARLI Conferences. EARLI Office can support SIGs with a **voting system** in case of

two or more candidates. SIG Coordinators should disseminate a call for candidates and an announcement of the upcoming elections. Should a SIG choose to use the EARLI voting system, please contact EARLI Office for further information. Each of the candidates standing for election will need to supply these details:

a short **CV**

a **motivation letter**

a **portrait photograph**

WEBSITE

The EARLI website allows SIG Coordinators to communicate easily and directly with their membership easily and to disseminate information and calls to their members. SIG Coordinators can also manage their own SIG webpage, and easily update the information on the SIG Coordinators and activities

and activities. The EARLI Mailchimp tool has also been developed to allow each SIG to contact their members in a GDPR-compliant way.

Further information, instructions and your SIG login details can be obtained by contacting EARLI Office.

CON TACT

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