



SIG Handbook and Guidance

British Educational Research Association

Company Limited by Guarantee

Company Number 08284220, Registered Charity Number 1150237

Updated October 2019

Special Interest Groups (SIGs)

Nature and Purpose

BERA has a large number of Special Interest Groups (SIGs) that represent the particular research concerns and interests of groups of members of the Association. SIGs vary in size of membership and the length of time in existence. Each SIG is organised by convenors who co-ordinates the main activities of the SIG and who has agreed to take on a number of roles and responsibilities associated with the SIG.

Most SIGs are primarily concerned to develop, extend and enhance scholarly discussion and research capacity in the area of research interest and to improve networking among membership and associated national and international bodies. Many SIGs also maintain active links with national and international societies with similar special interests.

The main activities of SIGs revolve around:

- BERA's annual conference;
- Activities such as events, workshops and seminars;
- Communication, discussion and networking;
- Promotion and dissemination of SIG-related research interests.

Convenors – Role, remits and appointment

SIG Convenors are volunteers whose main role is to co-ordinate, oversee and develop the mission and activities of each particular SIG. The SIG is there to represent the views of their members, not of individual convenors.

We encourage each SIG to operate their business in pairs. More than 2 SIG Convenors will be permitted if there is an intended handover period and one convenor will be stepping down within 6 months-1 year. It is expected that convenor(s) terms of office will be staggered to ensure continuity. It is also expected that convenors will normally serve for a 3-year term with possible renewal subject to the agreement of the SIG membership. Where new convenors need to be elected, a democratic election process is managed by the BERA Office and is done to ensure that all current members of a SIG have the opportunity to express their interest in taking on a role and then voting if there needs to be an election. Issues of leadership and continuity may be discussed at the SIG Forum meeting during Conference but this is not a suitable place to run an election as not all members may be in attendance.

The BERA Office will keep a record of all SIG convenors and the length of their term. Unless agreed by the office, Convenors must be a current member of BERA set up on the Direct Debit payment plan. This is done to ensure there is no gap in membership at the beginning of the calendar year.

SIG Convenors should expect to work within all the guidelines and advice provided by the BERA Office. These are in place to ensure good practice and that all legal, financial and insurance matters are taken care of and that any risks to individuals or organisations are minimised. In particular with regard to planning events, activities or any expenditure, SIGs should all follow the appropriate procedures.

By agreeing to assume a position of SIG convenor, individuals are committing to fulfilling all of the responsibilities and obligations that go with that role. SIG Convenors are expected to exercise their own judgment to meet the requirements listed in BERA guidance and to seek further advice from the BERA Office if in any doubt. If any procedures are not followed then the BERA Office reserves the right to take whatever action may be necessary to protect BERA's legal, financial and reputational position. Such matters will also form part of the review of each SIG that is undertaken by Council.

Annual Responsibilities for SIG Convenors include:

	Notes	Expected time commitment
January	SIG Convenors Newsletter	BERA Office
January-March	Send out SIG Newsletter to SIG members. Ideally at least 4 per year. Can promote abstract submissions under your SIG for conference	2-3 hours
February	SIG Convenors Newsletter Will include: <ul style="list-style-type: none"> • Abstract submission statistics • Membership list 	BERA Office
February	Reviewing abstracts or acting as a third reviewer	2-3 hours if required
March	SIG Convenors Newsletter	BERA Office
April	SIG Convenors Newsletter Will include: <ul style="list-style-type: none"> • Conference concession information • Abstract submission statistics • Reviewer information • Membership list 	BERA Office
April-June	Send Out SIG Newsletter to SIG members. Ideally at least 4 per year. Can promote number of abstracts accepted and encouragement to register for the conference	2-3 hours
May	SIG Convenors Newsletter	BERA Office
May	Accepted abstracts to be grouped into sessions	1 day (depending on volume of abstracts)
June	SIG Convenors Newsletter Will include: <ul style="list-style-type: none"> • Abstract submission statistics • Membership list 	BERA Office
June	Hot topic session proposals for conference	(dependent on proposal)

June	Attend SIG Away Day in London	1 day
June-July	Consider succession planning and liaise with BERA Office. This can be advertised at the conference for applications from October	2-3 hours if required
July	SIG Convenors Newsletter	BERA Office
July-September	Send Out SIG Newsletter to SIG members. Ideally at least 4 per year. Can promote programme for conference and/or other activities at conference	2-3 hours
July	Review and send updates for SIG Flyer	1 hour
July	Review SIG landing page on BERA website and send updates	2 hours
August	SIG Convenors Newsletter Will include: <ul style="list-style-type: none"> • Abstract submission statistics • Membership list 	BERA Office
September	SIG Convenors Newsletter	BERA Office
September	Various conference duties	(dependent on size of SIG)
October	SIG Convenors Newsletter	BERA Office
October-November	Complete SIG Annual Report	2 hours
October-December	Send Out SIG Newsletter to SIG members. Ideally at least 4 per year. Can promote follow up from Conference and/or abstract submissions and/or call for new convenor(s)	2-3 hours
November	SIG Convenors Newsletter	BERA Office
December	SIG Convenors Newsletter Will include: <ul style="list-style-type: none"> • Membership list 	BERA Office

SIG Promotional and Communications Activities

BERA Conference

Meetings

SIG Review

SIG Convenor Newsletters

BERA Conference

SIG Convenors role at conference can vary each year, however, they broadly are:

Pre conference responsibilities:

- Recruiting reviewers to review abstracts/submissions
- review 'problematic' abstracts/papers or in cases where a reviewer has not completed reviews
- Programming - organise and group accepted SIG papers and symposia for the annual conference timetable
- Advertising conference

During conference responsibilities:

- Attend and chair your SIG forum meeting
- Available during lunch breaks
- Encourage membership of BERA and your SIG
- Twitter presence highly desirable
- Chairing sessions
- One SIG Convenor to be present for each SIG session if possible. Convenors will also therefore be available when no chair is available for that session (larger SIGs will be supported by Council Members with this)
- Run SIG best paper award

Concessions for Conference

Convenors are vital to the work of BERA, investing energy in the promotion of the SIG and its activities. This ongoing investment is greatly appreciated by BERA Council and SIG membership and recognised by the incentive of support for the BERA conference for active convenors.

Registration fees for the annual conference are made available for TWO SIG convenors. No travel or accommodation will be reimbursed. This is in recognition of the work associated with the reviewing process, programming, chairing and support for the conference and work involved in preparing for and running the SIG Forum meeting at this event. Full details of concession will be sent in a SIG Convenors Newsletter.

Communications

In order to ensure that all SIG members are regularly updated with news on SIG activities the BERA Office will facilitate all communication with SIG members on behalf of SIG Convenors. Data protection law necessitates that the BERA office cannot share BERA members' email addresses directly with convenors. All communication for SIG members should be sent to the BERA Office to distribute.

To manage the amount of communications that members receive from BERA once we receive the details of your newsletter, this will be scheduled into the marketing calendar and you will be informed of when this is scheduled to be sent.

All SIG activities and events will be advertised directly to SIG members as well as publicised and reported through other BERA channels, such as Research Intelligence and the BERA website.

The BERA office receives completed SIG forms from new and existing members daily, and updates SIG member lists accordingly. SIG are not permitted to use their own distribution lists for communication purposes.

Financial and administrative support

SIGs receive an annual joint allocation (i.e. each SIG does not have its own allocation) from the Council for the development of relevant and appropriate activities or resources throughout the year. This may be spent on any legitimate activity during the present year with the approval of the Executive Director. Any expenditure must be within the legitimate scope of the SIG and must be recorded with the BERA office.

SIGs applying for funding must use the appropriate approval form before any contractual agreements, or any expenditure is incurred and submitted to the BERA office for accounting and payment purposes. The intention is that each SIG is self-supporting.

The BERA office now has increased capacity to support individual SIGs. However, it will seek to facilitate SIG activity by providing resources that are available for all SIGs.

For each event this is outline in the Events Guidance document.

Additional Funding

SIGs may submit a proposal to the BERA Office for additional funds to support an identified activity. A statement describing the planned activity including the nature of the event and the approximate costings showing how the BERA allocation will be used along with any other available income must support such a request.

Annual Report

The annual report must be completed each year for every SIG. SIGs will be given an appropriate amount of time to complete the form and the form will be considered as part of the SIG annual review process detailed below. Any SIGs who do not submit their annual report will have all activities suspended until the report has been received or until the BERA Office has been notified of the reason for delay.

Reviewing SIGs

While BERA wishes to see the research interests of its membership reflected in a comprehensive and vibrant range of SIGs, Convenors (and SIG members) need to be alert to and monitor the relative health and utility of the SIG on an ongoing basis.

Not all SIGs have to attract large memberships and support to be fit-for-purpose; many smaller SIGs harness and represent vital and niche pockets of research interest that could otherwise be lost. However, it is counterproductive to have a proliferation of SIGs that remain on the books but are dormant or showing diminished activity and interest from BERA membership.

Therefore, BERA Council will review existing SIGs on an annual basis. SIGs will not be assessed against strict performance metrics but instead against things such as the number of newsletters sent out, events they have held, the number of papers for Conference and general activity over a two year period to determine their level of activity. EC and CEC will feed into this with ultimate authority resting with Council.

If Council feels the need to intervene after such a review, then this could take a number of forms including replacing the Convenor, refocussing, merging or even disbanding the SIG.

Other questions that will be asked during this review could include:

- Is the SIG fulfilling its aims and mission?
- Has the focus of research interest by the SIG outlived its usefulness?
- Is there an active and supportive membership evident?

- Does the SIG attract sufficient numbers/ quality papers for review?
- Are the SIG sessions well-attended at the annual conference?
- Is the SIG attracting 'new blood'?
- Are activities and events run between conferences?
- Would there be benefits in merging with another SIG?

SIG Forum Meetings

All SIGs are invited to hold an annual Forum meeting. This will normally take place during the Annual Conference at an allocated time. The SIG Forum meetings can be attended by Non Members as well as Members. SIG Convenors must record a sign in record for all delegates that attend the SIG Forum meeting and return this to the BERA staff during the Conference.

SIG Event Guidance

PLEASE NOTE TO RESERVE A DATE YOU DO NOT NEED TO COMPLETE THIS FORM. PLEASE EMAIL CONFERENCE@BERA.AC.UK WITH THE DATE YOU ARE PLANNING TO RUN YOUR EVENT.

SIG events are supported through the BERA office. The level of administration will differ according to each event. BERA **should** manage the registration for all events, unless agreed in advance by the BERA Office in exceptional circumstances only.

Proposal forms must be sent at least **3 months** before the date of the event.

If the event is collecting abstracts for the programme the deadline for abstracts to be submitted must be at least 8 weeks before the event, with decisions confirmed by at least 6 weeks before the event.

The BERA office can now also provide additional support. This will include:

- Venue liaison including room set ups and catering
- Speaker invitations, chasing invitations, sending confirmation letters, chasing abstracts, chasing presentations, sending travel expenses forms
- Prepare a flyer that can be circulated to your networks, and provide printed copies as well
- Ensure adequate insurance is in place
- Advertise on the BERA website and collect registrations
- Collect abstract submissions
- BERA will include some student bursaries for attendance to the event and up to £75 towards travels costs (This is not part of the SIG funds)
- Email SIG members with details of the event
- Send joining instructions at least one week before the event
- A BERA staff member will attend the event or if not, we will provide an on the day (OTD) box with all the necessary materials for the event
- After the event
 - Evaluation summary
 - Follow up email to delegates
 - For some events we may provide podcasts and presentations available online after the event if the presenters approve

The proposal form **MUST** be completed **BEFORE** the use of the BERA logo, and contractual agreements, or any expenditure is incurred and submitted to the BERA office for accounting and payment purposes. All events with the BERA logo or name must be approved by the office to ensure it is covered by our insurance policy. A proposal form must also be completed if the logo or BERA name is to be used, even if no expenses are required.

We will not normally support an event financially or with the BERA name or logo that is collecting registration fees through a third-party website (i.e. Eventbrite or ticketsource). This is for data protection reasons as well as financial security.

Funds can only be spent once a proposal form has been approved. The BERA office will send a budget with all costs for the SIG convenor(s) to confirm. The budget will be reviewed and adjusted if necessary, by both parties. Once approved by the convenor the budget is final. Surplus from an event cannot be split with another organisation unless agreed in advance with the BERA office. All events should normally include a fee for all delegates. There must be preferential rates for

members for all events. Based on the purpose of the event, some events can be free of charge for all delegates or members only but a case for this will need to be made on the proposal form.

For any joint events you will need to confirm the other organisations support. I.e. providing complimentary venue hire, financial support towards speaker expenses, or financial cash sponsorship to be used towards the overall budget. If the organisation wants access to the delegate contact list, this must be agreed in advance as the terms and conditions of the event must be updated.

Where possible we anticipate venue hire will be provided free of charge from the host institution. Their logo will then appear on the flyer for marketing. We would also provide **ONE** complimentary space for someone to attend.

The budget is produced by the BERA office taking into account the expenditure detailed on the form. Based on the expenditure BERA will calculate the delegate fees and the extra funding that may be provided for the event (there is no limit to the amount of additional funding that can be allocated).

Please note the following when calculating the expenditure

- all costs are inclusive of VAT if applicable
- only one Convenor per SIG can claim expenses
- complimentary spaces are only guarantee for 2 SIG Convenors per SIG, speakers and if the event is a joint event, 1 person from the organisation
- sometimes to balance the budget expenses may be calculated as a portion of the total amount. In these cases, the budget will overrule the expenses terms and conditions on the claim form
- As per the charity guidelines, BERA cannot provide expenses for the convenor if the event is taking place at your host institution
- BERA is unable to provide speaker fee costs, or cover costs for speakers to be released from work

This information is not exhaustive as each event will run differently and each event will be reviewed on a case by case basis.

If you have any queries or require any further clarification, or would like to discuss any element of the guidance, please email conference@bera.ac.uk before you complete the form.

SIG Event/Project/Logo/Finances proposal form

To be completed **BEFORE** the use of the BERA name or logo, SIG name, and contractual agreements, or any expenditure is incurred and submitted to the BERA office for accounting and payment purposes. All events with the BERA name or logo must be approved by the office to ensure it is covered by our insurance policy.

ALL FIELDS TO BE COMPLETED UNLESS STATED. A DECISION MAY BE DELAYED IF THE FORM IS NOT COMPLETED FULLY.

Name of SIG:				
Other SIGs involved:				
Convenor(s):				
What are you proposing?	Event	Project	ONLY Logo	ONLY Finances and Logo
Title of event:				
Start and End date:				
Time:				
Venue address:				
Room name:				
Venue contact:	ONLY COMPLETE IF FOR AN EVENT PROJECT			
Estimated number of attendees:				
Maximum capacity of venue:				
Target Audience:				
Aims and objectives of event/project:				
Which BERA strategic priority will this project serve (please tick):	Advance research quality	Build research capacity	Foster research engagement	
How does it meet the strategic priorities:				
How will this event engage across the four nations and internationally?				

What are your proposed outputs: <ul style="list-style-type: none"> ➤ Summary of activity for Research Intelligence ➤ BERA blog before the event ➤ BERA blog after the event ➤ BERA blog special 	
Summary of engagement and impact Please include: -How will this project promote BERA to a wider audience -How timely is the proposed project -How will the project engage members and non-members?	ONLY COMPLETE IF FOR A PROJECT
If this is for an event will BERA members be able to register at the preferential rate:	ONLY COMPLETE IF YOU ARE REQUESTING USE OF THE LOGO ONLY OR FINANCES ONLY
What is the benefit of BERA's logo appear on this project/event:	ONLY COMPLETE IF YOU ARE REQUESTING USE OF THE LOGO ONLY OR FINANCES
How much funds are required? What is the benefit of BERA's providing this funding:	ONLY COMPLETE IF YOU ARE REQUESTING USE OF THE LOGO ONLY OR FINANCES ONLY
If collecting abstracts 250 word paragraph for the promotional flyer	ONLY COMPLETE IF YOU ARE COLLECTING ABSTRACTS FOR THE EVENT <i>The deadline for abstracts to be submitted must be at least 8 weeks before the event, with decisions confirmed by at least 6 weeks before the event.</i>
250 word paragraph for the generic promotional flyer	
Image ID number for image for flyer from http://www.shutterstock.com:	
Full programme including timings. i.e. format 09.00 – Registration, tea and coffee 09.30 – Keynote Speaker 1, Location, Title of presentation, contact details 10.30 – Keynote Speaker 2, Location, Title of presentation, contact details 11.00 – Lunch break Etc...	PROGRAMME MUST INCLUDE TITLES OF PRESENTATIONS
Speaker contact details including institution and email addresses	

Joint Partners and form of contribution:	Free venue hire	Speaker expenses	Financial support	Other (please state)
Budget Calculations: (VAT will be added to costs if not explicitly specified on quotes)				
Venue Hire	£			
Audio Visual Requirements	£			
Catering – tea and coffee (per person)	£			
Catering – lunch (per person)				
Catering – other (per person)				
Speaker Travel Expenses	WILL BE CALCULATED BY THE BERA OFFICE			
Convenor Travel Expenses	WILL BE CALCULATED BY THE BERA OFFICE			
Other Comments for the budget				
Signature or email giving written authorisation (by signing this you agree to the guidance):				
Date:				

Please ensure all fields are completed and you have read the guidance below. Email completed forms to conferences@bera.ac.uk. Decisions can take up to 2 weeks for approval.