



# **SPECIAL INTEREST GROUPS**

**POLICY AND GUIDANCE  
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# Introduction

Dear SIG and JURE Coordinators,

By means of this updated SIG policy and guidance document, we would like to keep you up to date regarding the different aspects and processes related to the management of an EARLI Special Interest Group (SIG).

For further questions please contact [ruben.hendrickx@earli.org](mailto:ruben.hendrickx@earli.org).

Very best wishes,



Prof. Armin Weinberger  
EARLI President-Elect  
*Consolidation and Innovation*



Ruben Hendrickx  
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# What are SIGs?

## **"SIGS ARE THE SCIENTIFIC BACKBONE OF EARLI."**

"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).**"

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**, 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 **27 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](http://www.earli.org/SIG)).



Should you feel a certain topic is not represented within the current offering, it is possible to found a new SIG.

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 (see "SIG Positions").

# Founding of a SIG

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

To apply for the founding of a new SIG, please **send a proposal by e-mail to the EARLI Office** ([ruben.hendrickx@earli.org](mailto:ruben.hendrickx@earli.org)) including the information listed on the next page.

The EARLI Office will present this proposal at the next meeting of the EARLI Executive Committee (EC). These meetings are held twice a year, in March and October. 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 **leadership continuum** where only one Coordinator is being replaced every two years.

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

Information that needs to be included in the proposal to found an EARLI Special Interest Group (SIG):

- A **mission statement** (max. 500 words) with a clear profile description of the new SIG, including the identity, aims and scope of the SIG.
- A short **curriculum vitae** of the two SIG Coordinators who are willing to establish 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 (these doesn't have to be four consecutive years).
- 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 relevance to EARLI (e.g. E-CER, EFG, EARLI symposia, etc.).
- A description of **possible complementary connections** to existing SIGs and Emerging Field Groups (EFGs).
- 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** (EARLI Office will distribute a survey), 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."

## 1. ORGANISE:

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

- Host at least **one SIG activity** in the year in between EARLI Conferences (e.g. SIG conference, webinar series, monthly newsletter, etc.). SIGs are encouraged to organise multiple activities to allow for a diverse offer of activities to its members.
- 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.
- Ensure a steady number of SIG members with a **minimum of 30 members per year**.

## 2. CONTRIBUTE:

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

- Propose **keynote speakers** for the Biennial EARLI Conference. Each SIG will be contacted by the EARLI Office during the preparations of the conference.
- Nominate SIG members and Coordinators to act as **reviewers** for the Biennial EARLI Conference.
- Organise a **SIG Invited Symposium** at the Biennial EARLI Conference. Each SIG will be contacted by the EARLI Office during the preparations of the conference.

## 3. INNOVATE:

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:

- 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.
- 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.\*

- EARLI encourages SIGs to try to reach a **diverse group of members**, consisting of both senior and junior researchers, representing different nationalities.
- SIGs are supported in **initiating collaborations** between SIGs, other research groups or even partners external to EARLI.
- SIGs are 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. Furthermore, the EARLI website offers SIG Coordinators the opportunity to manage their own SIG webpage. Lastly, the EARLI Mailchimp tool also offers the opportunity to easily communicate with SIG members.

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

# SIG Positions

“Each SIG is governed by two SIG Coordinators, assisted by a JURE Coordinator. All EARLI members with a minimum 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 Coordinator:

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

- A JURE Assistant Coordinator can be **appointed or replaced** only **in uneven calendar years**, i.e. the years linked to the Biennial EARLI Conference.
- The JURE Assistant Coordinator should be a **JURE member** at the start of his/her term and should stay on for a **minimum of two years and a maximum of four years**.
- The JURE Coordinator **assists the SIG Coordinators** in their activities.
- SIG Coordinators have to disseminate a **call for candidates** to JURE members and should manage the procedure of selection and appointment.



- **Elections** need to be organised well ahead of the EARLI Conference. EARLI can provide the SIG Coordinators with a voting system.

## SIG Coordinator:

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

- Taking a **leadership** role to further develop your SIG.
- 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.
- Organising **SIG activities** (e.g. seminars, conferences, newsletters, etc.) consistent with the EARLI scientific mission and strategy.
- Monitoring the **financial situation** of the SIG and the financial balances of the activities.
- Liaising with the EARLI Office to organise the **SIG/JURE Coordinator elections** well ahead of the Biennial EARLI Conference.
- Composing an **annual report** of the organised activities (the EARLI Office will send out a survey).
- Be available to act as a **reviewer** for the EARLI Outstanding Publication Award (which is announced during the Biennial EARLI Conferences).
- **Stimulate activity** on the EARLI website and through social media. Social media guidelines are provided by the EARLI Office.

# SIG Timelines

## Year of the Biennial EARLI Conference:

January  
-  
March

Disseminate a **call for candidates** for the open position of JURE and/or SIG Coordinator.

March  
-  
June

Organise the **election** of a new JURE and/or SIG Coordinator.

June  
-  
July

Communicate the **agenda** of the **SIG Members' Meeting**.

August

### **Biennial EARLI Conference:**

- SIG Invited Symposium
- Appointment of new JURE and / or SIG Coordinator
- SIG Members' Meeting
- SIG Coordinators Meeting
- General Assembly Meeting

## SIG Conference Timeline:



# SIG Support

"The EARLI Executive Committee and the 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."

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

- The EARLI Office can guide each SIG through every stage involved in their conference organisation by means of a **conference roadmap** (available via the 'documents' section of your personal [EARLI account](#)).
- The **EARLI conference management system** is available for use by each SIG, with additional technical support provided by the EARLI Office.
- Each SIG in need of financial support can apply for the **SIG interest-free loan**, to cover initial costs related to the organisation of their activities. This amount is limited to a maximum of € 2.000 per SIG per two year cycle and should be paid back to EARLI in case the activity makes a profit.
- EARLI offers each SIG the option to use the **EARLI voting system** to manage SIG/JURE Coordinator elections, as well as polls amongst the members of their SIG.
- Each SIG can update their own **SIG webpage** on the EARLI website, through the use of a specific SIG user account. Additionally, SIGs can host a **conference website** within the EARLI website, in the form of a one-pager.

- Each SIG can make use of **Mailchimp** in order to communicate with their members in a GDPR compliant way.
- EARLI provides a set of **social media guidelines** with some tips and tricks on how to use social media as an EARLI SIG.

## 1. EARLI Conference Management System:

The EARLI Conference Management 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 conference support services tailored to the specific needs of your SIG. **Choose the module(s) that is/are best suited to your SIG** or get in touch with the [EARLI Office](#) with any questions you might have.

After providing the basic information about your conference, the **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** and a series of **tutorial videos** (which are made available to all SIG and JURE Coordinators via their personal [EARLI account](#)), you will be guided through each of the steps involved in managing your conference. Additionally, the **EARLI Office remains available for support** should you experience any difficulties throughout the process.

## **1.1 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.

## **1.2 Registrations:**

It is not possible to directly manage the registrations for your conference through the EARLI Conference Management System. However, EARLI provides an overview and advice regarding the different available options to manage your conference registrations.

## **1.3 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.

## **1.4 Guidebook Conference App.:**

There is an API link between the EARLI Conference Management System and the Guidebook mobile app. which allows for an automatic transfer of your conference programme to the mobile app. Please bear in mind that the use of this conference app. is not free of charge.



Please consult the [Guidebook website](#) for specific price information.

## 2. Financial Support:

### 2.1 SIG Interest-Free Loan:

EARLI provides an **interest-free loan** for SIG activities, consisting of **€ 2.000,00 per two year cycle**.

By providing this interest-free loan, 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 interest-free loan is primarily aimed to help SIGs cover the initial costs of their conference before any conference income is available. Therefore, the application should be submitted to the EARLI Office at least **4 months prior** to the conference.

Should a SIG Conference make a loss, this sum can be used to cover the loss. Similarly, if the SIG Conference makes a profit, this interest-free loan 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 and further information with regards to the interest-free loan.

The loan will be paid by the EARLI Office after the SIG activity has taken place and upon receipt of the **SIG Coordinators' report** (EARLI Office will distribute an online survey).

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 interest-free loan request should at least include the following elements:

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

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

- A **meeting** of the two SIG Coordinators cannot be considered for funding.
- Any activity taking place **during the year of the Biennial EARLI Conference**, including the SIG Members' Meeting, cannot be considered for funding.

- Should the SIG activity include a **registration fee**, a reduced registration fee should apply for EARLI and JURE members.
- This reduced rate should be **no more than 80%** of the fee charged for non-EARLI participants.
- The EARLI Executive Committee highly recommends SIGs not to charge more than **€ 300,00** for EARLI members.
- 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 SIG interest-free loan). It is the responsibility of the SIG Coordinators to monitor the financial situation.
- The sponsored SIG activity must take place within **Europe** (including Israel).
- **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 interest-free loan request.

## 2.2 Budget Management:

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

## 2.3 Financial Follow-Up:

Additional to the interest-free loan offered to SIGs, the 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 process.

## 3. Communication:

### 3.1 EARLI Voting System:

SIG Coordinators are responsible for the **continuity** of their SIG and are therefore in charge of **organising elections** to find a suitable successor. The election procedure should be started up well ahead of the Biennial EARLI Conference. The EARLI Office can support SIGs with a voting system to manage the election process. 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 the [EARLI Office](#) for further information. Each of the candidates standing for election will need to supply these details:

- Short CV
- Motivation letter
- Portrait photograph

The following [tutorial video](#) explains how to create a poll using the EARLI voting system.

### 3.2 EARLI Website:

The [EARLI website](#) allows SIG Coordinators to communicate easily and directly with their membership. SIG Coordinators can **manage** their **own** [SIG webpage](#), and easily update the information on the SIG Coordinators and activities.

Via the 'documents' section of their personal [EARLI account](#), each SIG and JURE Coordinator can access a user manual that explains how to edit the webpage of their SIG.

### 3.3 Mailchimp:

The EARLI Executive Committee has invested in the development of an **integrated mailing system** allowing SIGs to communicate in a **GDPR compliant** way with their members and conference attendants.

Via the 'documents' section of their personal [EARLI account](#), each SIG and JURE Coordinator can access a manual and two tutorial videos that explain the key elements on how to work with Mailchimp.

For further information, please consult the [Mailchimp helpdesk](#) or the [EARLI Office](#).

### 3.4 Social Media:

EARLI offers a set of [social media guidelines](#) that can guide a SIG in managing their social media accounts.

Besides sharing information via your own SIG's social media accounts, it is also possible to advertise your SIG's activities via the EARLI social channels ([Twitter](#), [Instagram](#), [Facebook](#), [LinkedIn](#) and [YouTube](#)).

In case you have something to share, please contact the [EARLI office](#).



# Contact



## **EARLI Board of Directors**

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