



# BSA Study Groups Terms of Reference 2019

*This version approved September 2014  
Terminology (not policy) updated September 2016*

## Introduction

This document outlines the requirements and responsibilities (of both the BSA and its study groups) and provides information on how to run a study group.

BSA study groups are part of the BSA's overall charitable activity and status and are subject to certain legal requirements. Study group convenors must ensure that the group is operating in compliance with the requirements outlined below.

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## Legal and Financial Obligations

### 1. The role of the BSA

*The Association, working through the Board of Trustees, commits itself to:*

- i. Providing a legal framework for the operation and activities of the study groups;
- ii. Monitoring study group activities;
- iii. Supplying appropriate administrative assistance through the BSA office in Durham;
- iv. Providing expert event management advice and support;
- v. Providing free access to the BSA London and Durham Meeting Rooms;
- vi. Organising, maintaining, auditing and reporting on study group designated accounts;
- vii. Annually applying a pro rata share of any interest generated by BSA funds to the designated funds of the study groups;
- viii. Approving the formation of new study groups (see section 7);
- ix. Closing non-viable study groups (see section 8)
- x. Assisting in the recruitment of study group convenors and members by promotion to BSA members and on the BSA website;
- xi. Assisting in the promotion of study group events and activities by providing free publicity to BSA members and on the BSA website;
- xii. Providing advice and support in dealing with media enquiries;
- xiii. Appointing a representative for the study groups who speaks on their behalf at BSA Advisory Forum meetings;
- xiv. Facilitating policy discussion and the sharing of knowledge and experience between study groups by organising an annual meeting for convenors
- xv. Approving the constitution of study groups, including practice and rules of membership (see section 3);
- xvi. Setting general policies in terms of language and ethics for members involved in study group activities;
- xvii. Providing a web presence via the BSA website;
- xviii. Covering 'normal' study group activities via the BSA's Public Liability insurance policy.

### 2. The role of the convenor

- i. BSA convenors and other officers\* of the study groups must be members of the BSA;

\*Officer relates to anyone holding a role of responsibility within the group e.g. treasurer or conference organiser.

- ii. Convenors will have final authority on decisions about the academic activity of the study groups; It is good practice for convenors to consult their study group members on all relevant matters;
- iii. The convenor will ensure that the study group complies with BSA Study Group Terms of Reference and other BSA policies and will ensure that study group members do likewise;
- iv. The term of office of the convenor/s and other study group officers can be terminated by the BSA Board of Trustees on grounds of non-compliance to the Study Group Terms of Reference;
- v. The convenor will ensure that an accurate record of the membership of the group is maintained;
- vi. The convenor will be responsible for co-ordinating the group's programme of activities, including participation in the BSA annual conference;
- vii. The convenor will actively participate in the annual Study Group Convenors' meeting called by the BSA Board of Trustees to ensure that the Association continues to meet the needs of its study groups and vice versa;



- viii. The convenor will ensure that relevant information about the study group and its activities is communicated regularly to the BSA office so that it can be posted on the website, emailed to BSA members and included in the BSA members' newsletter, as appropriate;
- ix. The convenor will act as the named contact for media enquiries relating to the study group subject area;
- x. The convenor will not commit to any financial liability without authorization from the BSA office. If any such financial liability cannot be met from the group's funds, the convenor will be personally liable.
- xi. The search for and nomination of new study group officers is the responsibility of the study group convenor. Once a new convenor is appointed, the new and former convenors will inform the BSA office of the change;
- xii. The convenor will be responsible for ensuring that the entry for the group on the BSA website is accurate and up to date;
- xiii. The convenor or other study group officers will submit a proposal to the BSA Board of Trustees, if the study group wishes to have a website or social media presence other than on the BSA website. The proposal shall include details of where the site will be hosted; how much it will cost (including any monthly/annual charges); what it will include; how it will be maintained; and the measures in place to ensure continuity in the event of the person responsible for updating the website stepping down from the role;

The study group convenor will submit a short (max. 500 words) annual report to the BSA Board of Trustees by the end of February each year including the following:

- a. A record of the number of members in the group, including the number that are BSA members;
- b. Income, expenditure and balance (BSA Office can supply these details);
- c. Aims of the group;
- d. A summary of activities undertaken in the past year (January to December);
- e. A summary of activities planned for the coming year (January to December);
- f. The names and contact emails of the convenor(s) and other officers.

### 3. Membership

- i. Membership of the BSA includes free membership to any study group;
- ii. Study group membership is not restricted to BSA members, in the interests of research networking and the promotion of sociology; however at least 50 percent of the membership of a study group should be made up of BSA members;
- iii. BSA members must be offered preferential rates for any study group activity for which there is a charge and the preferential rates must be clearly stated in any promotional material.

### 4. Finances

- i. The BSA trustees are legally responsible for all financial transactions relating to the BSA – including study group transactions;
- ii. All study group financial activity will be administered and managed by the BSA office;
- iii. All expense claim forms must be authorised by a BSA study group convenor before being submitted to the BSA office;
- iv. All expense claim forms must be received by the BSA office within three months of the event for payment;
- v. All events must charge a differential between BSA members and non-members to demonstrate the benefit to BSA membership;
- vi. All expenditure made by the study group, except individual travel claims, requires a purchase order number obtained from the BSA office. This purchase order number provides the group with authorisation for the expenditure and should be quoted on the supplier invoice; Failure to adhere to this requirement may lead to personal liability as detailed above under 2.x;



- vii. Each study group will have a designated (earmarked) fund from which expenditure and income relating to that study group will be drawn and applied;
- viii. The BSA will annually apply a pro rata share of any interest generated by BSA funds to the designated funds of the study groups;
- ix. The BSA will transfer the sum of £200 into a designated fund of each new study group that is established to help kick-start that group’s programme of activities;
- x. The BSA will provide an allowance in the charity’s overall annual budget of £200 per study group to act as a ‘buffer’ for expenditure and to enable groups to meet the requirement to meet at least once a year;
- xi. In the event of the closure of a study group, any accumulated funds will revert to the BSA’s general unrestricted fund;
- xii. The BSA will not underwrite losses incurred by study group events where authorization to commit to financial liability has not previously agreed by the BSA office (see also 2.x above).
- xiii. Study group events and activities must operate on a break-even or surplus-generating financial basis to support the future activities of the group;
- xiv. Surplus income generated by study groups will be added to the designated funds of the relevant groups;
- xv. Financial responsibility rests wholly with the BSA in respect of BSA events. An event is defined as a BSA event if it is wholly funded by the BSA, e.g. the BSA Annual Conference or study group event;
- xvi. Financial responsibility lies wholly with the host institution in respect of BSA-supported events. BSA-supported events are those events that are partially supported by money ‘given’ by the BSA e.g. the BSA Regional Postgraduate Days;
- xvii. Study Groups events which are partially supported by money ‘given’ by the BSA e.g. an event held at an academic institution using funds from the group’s designated fund, must carry appropriate acknowledgment on all promotional materials as follows:

*“This event has been made possible with the financial support of the British Sociological Association XXX Study Group and the voluntary assistance of its members. The BSA exists to promote Sociology.”*

- xviii. The study group organizer planning any event must establish how much the activities will cost, what funds are available, and that there are sufficient funds to cover all the associated costs.
- xix. Study group organizer planning an event is responsible to considering VAT in establishing the costs of the event.

**VAT is a complex area; please don’t assume that VAT is not applicable to your event.**

- Normally any VAT incurred in running a study group event will be irrecoverable and therefore will become an additional cost to the event.
- However, if a taxable activity (Exhibition Space) occurs at the study group event, the VAT incurred will become partially recoverable.

***For example a group running an event at The British Library***

<b><u>Income</u></b>			
Delegate Fees	50 x	£25	£1250.00
<b><u>Expenditure</u></b>			
Catering	50 x	£25	<u>£1250.00</u>
Surplus/Deficit		<b>Nil</b>	
<b><i>Additional cost</i></b>			
Irrecoverable			





- i. Where a study group has little activity and few volunteers, the BSA office will assist with trying to raise its profile to attract new members;
- ii. Over time, though, the array of study groups is bound to alter, so when it is clear that a group is no longer viable and active, the convenor(s) should notify the BSA office so that BSA publicity and records can be properly amended;
- iii. Any study group which does not submit an annual report for two successive years will be regarded as being no longer viable; the BSA office will make enquiries and issuing a warning before considering the study group as non-viable;
- iv. If/When a study group is considered non-viable, its designated account will be closed and references to it on the website and elsewhere will be removed.



## Tips for running a study group

- a. Have an extensive, up-to-date mailing list which includes BSA members and also non-BSA group members. Jiscmail is a useful way to set up and manage such a list. If you require advice on how to do this please contact the BSA office.
- b. Although the term of office of study group officers is not limited, it is good practice for the convenor to seek the approval of the members of the study group for officers to continue in role at least once every three years.
- c. It is good practice for the convenor to ensure that at least one meeting of the group is held each year to deal with elections, finances, and to plan activities. Wherever possible the meetings of the study group should not clash with the BSA's key events, for example the BSA Annual Conference.
- d. Get a group of volunteers, particularly postgraduate students, from within the study group to help divide the workload.
- e. When holding an event, ensure you cover your costs and try to make a small surplus to put in your designated funds so you can plan for future activities.
- f. Use venues/catering facilities with minimal cost: the BSA's London Meeting Rooms are free for study group events; some Universities may offer free space; and discount rates for charities can be negotiated by the BSA office at many venues.
- g. Treat your speakers like VIPs but do not pay them a fee; it is flattering to be acknowledged as a revered authority on a subject and speakers should welcome the opportunity to promote their work and engage with a specialist audience.
- h. Think carefully about the focus of the events and make them of interest/accessible to a wide audience of academics and practitioners as this will help to ensure a bigger audience.
- i. When organizing an activity/event, watch out for hidden costs – make sure you are clear about rates that will be charged (including VAT) at the outset and plan to cover these accordingly.

## Declaration

I fully understand, accept and agree to the terms of reference set by the British Sociological Association and confirm, to the best of my knowledge, that the group is operating in compliance with the requirements outlined above.

NAME: \_\_\_\_\_ Signature: \_\_\_\_\_

Study Group: \_\_\_\_\_