



BSA Study Groups Terms of Reference 2022

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Introduction

BSA study groups are the lifeblood of the association. Members find value in being part of networks relating to their specific areas of interest. Study group convenors are key to making this happen

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:

- 1.1. Providing a legal framework for the operation and activities of the study groups;
- 1.2. Overseeing study group activities;
- 1.3. Supplying administrative assistance through the BSA office in Durham;
- 1.4. Providing expert event management advice and support;
- 1.5. Organising, maintaining, auditing and reporting on study group designated accounts;
- 1.6. Approving the formation of new study groups (see section 7);
- 1.7. Closing non-viable study groups (see section 8)
- 1.8. Assisting in the recruitment of study group convenors and members by promotion to BSA members through all communication channels;
- 1.9. Assisting in the promotion of study group events and activities by providing publicity to BSA members through all communication channels;
- 1.10. Providing advice and support in dealing with media enquiries;
- 1.11. Appointing a representative for the study groups who speaks on their behalf at BSA Advisory Forum meetings;
- 1.12. Facilitating policy discussion and the sharing of knowledge and experience between study groups by organising an annual meeting for convenors
- 1.13. Approving, if any, the constitutions of study groups, including practice and rules of membership (see section 3);
- 1.14. Setting general policies in terms of language and ethics for members involved in study group activities;
- 1.15. Providing a web presence via the BSA website;
- 1.16. Covering study group activities via the BSA's Public Liability insurance policy.

2. The role of the convenor

- 2.1. 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.
- 2.2. Convenors will have 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;
 - 2.3. 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;
 - 2.4. 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;
 - 2.5. The convenor will ensure that an accurate record of the membership of the group is maintained;
 - 2.6. The convenor will be responsible for co-ordinating the group's programme of activities, including participation in the BSA annual conference in liaison with the relevant stream coordinator(s);
 - 2.7. 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;
 - 2.8. 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 BSA members' communications, as appropriate;
 - 2.9. The convenor will act as the named contact for media enquiries relating to the study group subject area;

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- 2.10. The convenor will not commit to any financial liability without authorisation from the BSA office. If any such financial liability cannot be met from the group's funds, the convenor will be personally liable.
- 2.11. 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;
- 2.12. The convenor will be responsible for ensuring that the entry for the group on the BSA website is accurate and up to date;
- 2.13. The convenor or other study group officers will submit a proposal to the BSA Office, 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;
- 2.14. 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

- 3.1. Membership of the BSA includes free or reduced rate membership to any study group;
- 3.2. Study group membership is not restricted to BSA members, in the interests of research networking and the promotion of sociology;
- 3.3. BSA members must be offered preferential rates for any study group activity and the preferential rates must be clearly stated in any promotional material.

4. Finances

- 4.1. The BSA trustees are legally responsible for all financial transactions relating to the BSA – including study group transactions;
- 4.2. To comply with audit regulations all study group financial activity will be administered and managed by the BSA office;
- 4.3. All expense claim forms must be authorised by a BSA study group convenor before being submitted to the BSA office;
- 4.4. All expense claim forms must be received by the BSA office within three months of the event for payment;
- 4.5. All events must charge a differential between BSA members and non-members to demonstrate the benefit to BSA membership and to ensure the BSA is compliant for tax purposes;
- 4.6. 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;
- 4.7. Each study group will have a designated (earmarked) fund from which expenditure and income relating to that study group will be drawn and applied;
- 4.8. 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;



- 4.9. In the event of the closure of a study group, any accumulated funds will revert to the BSA's general unrestricted fund;
- 4.10. The BSA will not underwrite losses incurred by study group events where authorisation to commit to financial liability has not previously agreed by the BSA office (see also 2.x above).
- 4.11. Study group events should be able to meet all expenditure incurred, either by charging a fee to cover expenditure or by using previously accumulated funds (see note 4.12).
- 4.12. Study group events should operate on a break-even or surplus-generating financial basis to support the future activities of the group; surplus income generated by study groups will be added to the designated funds of the relevant groups;
- 4.13. 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;
- 4.14. 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;
- 4.15. 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."

- 4.16. The study group organiser 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.
 - 4.16.1. The above example shows a group assuming that they are breaking even and covering all of their costs. However by not considering VAT the group has made a deficit of £250 as the VAT element of the event is 100% irrecoverable as there was no taxable activity (Exhibitors) at the event.

5. 6. Communication/publicity

6. All publicity material (i.e. poster, call for papers, event signage) relating to BSA activities that is to be sent to or may be read by a third party (whether in hard copy or electronic form) must carry the legal registration information of the charity in the format set out below:

6.1.1.1. "The BSA is a Company Limited by Guarantee. Registered in England and Wales. Company Number: 3890729. Registered Charity Number 1080235."

7. All publicity material (whether in hard copy or electronic form) must carry the Association's current logo;
8. Study groups wishing to have a website and/or social media presence other than on the BSA website must request it via the BSA office (see The role of the convenor);
9. All external study group websites will carry the BSA logo, a link to the main BSA website, the name of the study group [BSA XXX study group] and the charitable information detailed above;
10. The design of external study group websites will be in keeping with the BSA website appearance and design;

10.1.1. 7. Formation of a new study group

11. Proposals for new study groups must be submitted to the Membership Development Officer who will circulate to BSA Board of Trustees for approval;

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12. Proposals for new study groups must include the following:
13. an outline of the field to be covered, briefly explaining why a new group is needed;
14. a statement of the proposed aims of the group;
15. the support of at least fifteen current members of the Association (either hard copy signatures or e-mails), the names of the convenor(s), who must be a paid-up member(s) of the BSA at the time of proposal, and any other officers and committee members who have volunteered to support the group;
16. Proponents of new study groups should ensure that the proposed field of study is not likely to be deemed by the BSA Board of Trustees to be already covered by an existing study group.

16.1.1. 8. Closure of a study group

17. 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;
18. 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;
19. 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;
20. 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; some Universities may offer free space; and discount rates for charities can be negotiated by the BSA office at many venues.
- g. The BSA holds a Zoom licence for virtual meetings with limited availability contact the BSA office early.
- h. 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.
- i. 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.
- j. When organising 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. Contact the BSA office for assistance with budgeting.

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: _____ Date: _____