

DESI Membership in a Nutshell

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1 Introduction

This document aims to give an overview of how one gains and maintains membership in the DESI Collaboration. It is not a policy document, but merely an attempt to help consolidate and advertise our policies and practices.

DESI is a large international collaboration, governed by its Bylaws, which are available at <https://desi.lbl.gov/trac/wiki/PublicPages>. The word Project at this point refers to the DOE Construction project, which ends with the commissioning of the instrument. However, the scientific collaboration includes both the construction project and the subsequent wide-field survey. We expect that our scientists will be involved throughout the life-cycle of DESI.

DESI **Participants** are faculty and senior research staff; they join DESI by Memorandum of understanding (MOU) or formal letter. Participants must be individually approved by the Membership Committee of the Institutional Board. Unlike SDSS, simply being at a DESI Member Institution is not sufficient to join; DESI also requires an individual commitment of on-going effort (see §2). Participant applicants may be granted Provisional status for one year while they initially engage with the project and develop their plans for how to contribute and participate in DESI; see §3.

DESI Participants sponsor post-docs and students at their institution. Typically, a Participant can sponsor two post-docs and unlimited students. These junior members must be registered with the Membership Committee and after a year's grace period are also expected to contribute effort toward the common good.

The word Member refers to both Participants and their sponsors.

2 Expectations for Membership

2.1 Project and Collaboration Service

DESI expects that its Participants will engage in DESI as a substantial portion of their research effort. We seek to build an active collaboration in which all Participants are intellectually invested in the scientific products of the survey and are motivated to solve the many technical challenges that our survey will face. It is important that we avoid a server/client model in which some group produces the data for the consumption of a second group.

Because of this, the DESI bylaws require that Participants contribute their effort, in addition to their cash contribution. We interpret this as requiring ongoing effort toward Project and Collaboration Service (hereafter 'DESI Service'). We note that these contributions are expected throughout the life-cycle of DESI and may go beyond the original plans discussed in the project MOUs. Sponsored junior members, with the exception of undergraduates and graduate students in the first three years of graduate work, are similarly expected to make such a contribution. Sponsored junior members will be exempted for a one-year grace period as they learn about DESI and its collaboration.

Further, Participants joining the collaboration have specified an effort level in their MOUs for their total annual effort for the DESI experiment. This total includes DESI Service as well as work

41 toward collaboration science analyses (all papers, not just Key Projects). The effort is reported as
42 a percentage of the Participant’s research time.

43 Further definitions and explanations of Project and Collaboration Service, of DESI Total Effort,
44 and of our definition of Research Time are given in Section 2 of the DESI Membership Effort and
45 Builder Status Policy document, available at [https://desi.lbl.gov/trac/attachment/wiki/
46 PublicPages/membership.approved.v1.pdf](https://desi.lbl.gov/trac/attachment/wiki/PublicPages/membership.approved.v1.pdf). As the explanations are lengthy, we do not repeat
47 them here, but we note that Project and Collaboration Service includes a wide range of activities
48 for the common good of the collaboration.

49 Members are asked to specify their intentions for DESI service work (aka technical work) as
50 well as their intentions for DESI science, as part of the Membership Form. Further, the Participant
51 Information Sheet requested by the Membership Committee and incorporated into the initial MOUs
52 asks for descriptions in both of these categories.

53 **2.2 DESI Effort Accounting**

54 The ongoing contributions of all DESI members are tracked by the Membership Committee of the
55 Institutional Board, as described in Section 5 of the DESI Membership Effort and Builder Status
56 Policy document ([https://desi.lbl.gov/trac/attachment/wiki/PublicPages/membership.approved.
57 v1.pdf](https://desi.lbl.gov/trac/attachment/wiki/PublicPages/membership.approved.v1.pdf)).

58 Members will be asked on an annual basis to give a brief report on their DESI activities. We
59 believe that the annual reporting cycle will allow members to give more prompt and higher fidelity
60 reports on their activities and allow them a better sense of how they are converging to Builder
61 status.

62 In addition to a short description of activities, the Membership Committee requests three quan-
63 tities in this report:

- 64 1) Total Time on DESI, as a fraction of Research time.
- 65 2) DESI Service Time, as a fraction of Research time. Clearly this should not exceed item 1.
- 66 3) DESI Service Time, as average number of hours per (non-vacation) work week, prorated by the
67 fraction of the year engaged with DESI.

68 Item (3) is intended as a report of one’s effort in absolute hours toward DESI, which is what is
69 accumulated for Builder status. Item (1) is what is compared to commitments in the MOUs.

70 The form for effort reporting for 2013-2016 is at <http://bit.ly/desi-effort2016>. Effort in
71 2017 and beyond will be reported on an annual basis.

72 **3 Applying to be a DESI Participant**

73 People interested in becoming a DESI Participant should contact the chair of the Membership
74 Committee (currently Robert Blum, <mailto:rblum@noao.edu>) or the chair of the Institutional
75 Board (currently Greg Tarle, <mailto:gtarle@umich.edu>) or the DESI Director (Michael Levi,
76 <mailto:mlevi@lbl.gov>). These people will help in filling out the Information Sheet and the Mem-
77 bership Form. The Director uses this Information Sheet to construct the institutional agreement,
78 i.e., a MOU or an equivalent, which will also specify the institutional financial contribution.

79 Separately, the Participant should fill out the on-line Membership Form ([http://bit.ly/
80 desi-memform](http://bit.ly/desi-memform)). Our apologies that some inputs here will duplicate the Information Sheet, but

81 the Membership Form enters into the Membership Committee’s on-line repository.

82 The need to identify a good contribution path in the membership process can create a chicken-
83 and-egg problem in which people lack the access to the collaboration to identify areas of need. For
84 this case as well as the case in which identifying responsibilities is a pre-requisite to committing to a
85 financial contribution, DESI allows **Provisional Memberships**. These also require a Membership
86 Form (<http://bit.ly/desi-memform>) to be filed and approved, but it can be with less detail. It
87 is common for people to complete this step well before the Information Sheet is started.

88 Provisional Memberships will be reviewed at least annually to determine whether progress
89 toward a signed membership is proceeding. The prospective member is taking the risk of their time
90 and potentially their scientific investment in the case that the institutional membership cannot be
91 completed. There will be no repayments for time invested and it is possible that the person will
92 not be eligible for co-authorship on DESI papers.

93 4 Sponsoring a DESI Junior Member

94 When a Participant wants to sponsor a junior member, they should have the prospective member ap-
95 ply for a DESI trac account: <https://desi.lbl.gov/trac/wiki/PublicPages/AccountApproval>.
96 This will produce a request for the prospective member to fill out a Membership Form at <http://bit.ly/desi-memform> and will also notify the membership committee. Once the Membership
97 Form is filled out, the membership committee will approve the sponsoree and grant access to the
98 DESI wiki (trac) and mailing lists. This is intended as a low bar for the initial sponsorship.

100 After a year, the sponsored member should re-file the form with additional information about
101 their intended effort toward DESI service work.

102 5 Getting Involved in DESI

103 After your participation or membership is approved (including provisional), you should sign up for
104 the DESI wiki, mailing lists, and working group(s). To do this, first create a wiki account on the
105 Trac system, using the following instructions: [https://desi.lbl.gov/trac/wiki/PublicPages/](https://desi.lbl.gov/trac/wiki/PublicPages/AccountApproval)
106 [AccountApproval](https://desi.lbl.gov/trac/wiki/PublicPages/AccountApproval).

107 After this is approved, you should sign on to mailing lists. Click on the “Mailing List” button
108 on the top bar of the wiki. There are many lists, so you will want to identify the ones that are
109 relevant to you. All members should sign up for desi-general! To sign up, click on the list, then
110 click through the “more information about this list” link, and follow the directions for subscribing.
111 You will need to specify a password; we recommend choosing the same one as your wiki password,
112 just to keep it simple. After you subscribe, you will receive an email from the mail server asking
113 you to confirm your request. After you confirm, then you’re signed up. Unfortunately, you have to
114 register for each list separately.

115 If you are interested in one or more Working Groups or Committees (and we hope that you
116 are), then you should notify the chair(s) by email of your interest. The Working Groups and chairs
117 are listed at <https://desi.lbl.gov/trac/wiki/WorkingGroups> Each WG has an email list, so
118 you should sign up for that as well. All collaboration members will be asked to identify at least
119 one Working Group that they expect to contribute to scientifically.

120 Working Group telecons are announced on their email list. We also collect the telecon times onto
121 a Google Calendar: <https://www.google.com/calendar/embed?src=desi.redshift.survey@gmail.com>.

122 [com](#) and you can append that to your own calendar.

123 You should also keep contact with your local representative to the Institutional Board. If you
124 are at an institution with only 1 or 2 Participants, then you have a local non-voting representative
125 but also a voting at-large representative, currently Bob Kehoe (Southern Methodist University,
126 <mailto:kehoe@physics.smu.edu>).

127 **6 Updating your Membership**

128 Periodically, the Membership Committee will ask all Members to update their plans for DESI service
129 work and DESI science by re-submitting their Membership Form (<http://bit.ly/desi-memform>).
130 Understandably plans will evolve over the course of a decade-scale project, particularly as we
131 transition from construction to operations. We plan to require updates every two years, although
132 people are welcome to do so more frequently.

133 You can see your membership status and the date of your last update by finding your name on
134 the wiki page <https://desi.lbl.gov/trac/wiki/UserSummary>.