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 ended with the commissioning of the instrument. However, the scientific collaboration includes both the construction project and the subsequent wide-field survey. We expect that scientists in the collaboration will be involved throughout the life-cycle of DESI.

DESI **Participants** are faculty and senior research staff; they join DESI by a Memorandum of understanding (MOU) or formal letter. Participants must be individually approved by the Membership Committee and 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 (or unlimited post-docs if at a Full Member Institution). These junior members must be registered with the Membership Committee and also are generally expected to contribute service effort to the collaboration (as described below).

The word Member refers to both Participants and their sponsorees.

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 (generally, at least 20%). 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 cash or in-kind contributions. 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.

Participants joining the collaboration are required to specify their total annual effort that will be devoted to the DESI experiment. This total includes DESI Service as well as work toward collaboration science analyses (including all papers, not only Key Projects). The effort is reported as a percentage of the Participant's research time.

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

Members are asked to specify their intentions for DESI service work (a.k.a. technical work) as well as their intentions for DESI science, as part of the form they complete when applying for membership. This information should be updated when new service commitments are made. Potential Participants are asked to describe both their planned service and science activities as part of their application for that status.

2.2 DESI Effort Accounting

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

Members will be asked on an annual basis to give a brief report on their DESI activities. This annual reporting cycle allows members to give more prompt and higher fidelity reports on their activities and allows them a better sense of how they are converging to Builder status than a slower cycle would.

3 Applying to be a DESI Participant

People interested in becoming a DESI Participant should contact the chairs of the Membership Committee (currently Jeff Newman, `mailto:janewman@pitt.edu` and Tamara Davis, `mailto:tamarad@physics.uq.edu.au`) or the chair of the Institutional Board (currently Greg Tarle, `mailto:gtarle@umich.edu`) or the DESI Director (Michael Levi, `mailto:mlevi@lbl.gov`). These people will help in filling out the application for Participant status. The Director uses this information to construct the institutional agreement, *i.e.*, a MOU or an equivalent, which will also specify the required institutional financial contribution, if relevant.

The need to identify a good contribution path in the membership process can create a chicken-and-egg problem in which people lack the access to sufficient information from the collaboration to identify areas of need. For this case as well as the case in which identifying responsibilities is a pre-requisite to committing to a financial contribution, DESI allows one-year **Provisional Memberships** while Participant status is being negotiated. To enable this access, potential Participants should fill out the standard DESI membership form as well as the Participant application (See §4 below).

Provisional Membership is limited to a maximum of one year, during which time the formal membership process must be completed. Provisional members are not eligible to sponsor junior members nor to be an author on DESI papers. The prospective member is taking the risk of their time and potentially their scientific investment in the case that the institutional membership cannot be completed. There will be no repayments for time invested. Given this risk, it is strongly advised that the formal agreement should be completed as soon as practical.

4 Sponsoring a DESI Junior Member

When a Participant wants to sponsor a junior member, they should have the prospective member apply for DESI membership, following the instructions at `https://desi.lbl.gov/trac/wiki/NewMembers`. Once the Membership Form is filled out, and so long as the sponsoree has legitimate rights to join the collaboration, the Membership Committee will approve the sponsoree, and the sponsoree will receive further instructions for obtaining access to the DESI Trac wiki system and DESI mailing lists. This is intended as a low bar for the initial sponsorship.

After a year, the sponsored member should update their information in the DESI membership database to describe their intended effort toward DESI service work.

5 Getting Involved in DESI

After your participation or membership is approved (whether as a sponsored or provisional member), you should sign up for appropriate mailing lists and working group(s). When your DESI membership is approved, you will receive instructions for joining the DESI Trac system. To sign on to mailing lists, follow the instructions at `https://desi.lbl.gov/trac/wiki/MailingLists`. There are many lists, so you will want to identify the ones that are relevant to you (all members should be automatically signed up to the `desi-general` list on the Sunday after their account is approved).

To sign up to a list, click on the name of the list (in the left-most column) and follow the directions for subscribing. You will need to specify a password; we recommend choosing the same one as your wiki password, just to keep it simple. After you subscribe, you will receive an email from the mail server asking you to confirm your request. After you confirm, then you're signed up. You will have to register for each list separately.

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

Working Group telecons are announced on their email list. We also collect the telecon times onto a Google Calendar: `https://desi.lbl.gov/trac/wiki/WorkingGroups/WGTelecons/Calendar` and you can append that to your own calendar.

You should also keep contact with your local representative to the Institutional Board. If you are at an institution with only 1 or 2 Participants, then you have a local non-voting representative but also a voting at-large representative, currently Will Percival (University of Waterloo, `mailto:will.percival@uwaterloo.ca`).

6 Updating your Membership

Periodically, the Membership Committee will ask all Members to update their plans for DESI service work and DESI science by updating their entries in the DESI Membership Database. Understandably plans will evolve over the course of a decade-scale project, particularly as we transition from construction to operations. We plan to require updates every two years, although people are welcome to do so more frequently.

You can see your membership status and the date of your last update by finding your name in the Membership Database `https://desi.lbl.gov/desipub/app/Users/index`.