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APS FEd Standard Operating Procedures

Common Forms/URLs/emails

[APS Unit Request Desk](#) - website that has all of the different requests from APS

[Website Request Form](#) – website that allows the Secretary/Treasurer to ask the APS to update the FEd website

[Unit Newsletter Request](#) - website used to request the Newsletter

– website with the Travel & Expense Reimbursement form, Payment Request form, W-9, and Direct Deposit forms.

[Mini-Grant Application Form](#) – Google form where FEd members can apply for Mini-Grants

[Mini-Grant Reviewer Form](#) - Google form where reviewers can enter scores for Mini-Grants

fedexec@aps.org - email list for the FEd executive committee

apsunits@aps.org - email to APS employees who can help answer questions about FEd

accountspayable@aps.org - Treasurer emails this address when they want to process reimbursements

[Minutes](#) - document that lists the Forum minutes

[APS FEd Master Calendar](#) - calendar of all the master dates.

[Financial Reports](#) – Go to FEd Exec Communities on our APS FEd website and then click on the libraries tab. Folder with budgets are from APS

[Unit Statistics](#) – Go to engage.aps.org. **Sign In** using the button in the top right corner. Select Communities -> **My Communities** from the navigation bar at the top. Click the Community Navigator button, and either click the plus next to your unit name or search for your unit, and select the **Units Leadership** community. Visit the **Library** from the community navigation bar. Go to the Folder titled **Statistics**.

Timeline

The timeline essentially is broken down into a few sections: Meetings, Awards/Fellowships Committee, Programming Committee, Nominating Committee, and Mini-Grant Committee. Meetings is from January to April where there is a lull in committee work and we attend the Annual Leadership meeting, March Meeting, or April Meeting. The Awards/Fellowships committee then starts their work right after the April meeting soliciting nominations for APS Fellows, followed by work on the Reichert and Excellence in Physics Education Award through June. The Programming Committee starts working in late May and turns in their session descriptions June 15. They continue working throughout the summer and turn in all of the

invited speakers in the Fall. The Nominating Committee starts work August 1 to gather nominations and turns in their slate of candidates on October 15. Finally, the Mini-Grant Committee solicits applications on October 1 and turns in their awardees on December 1.

Jan 1 – Executive Committee Members start their terms. Secretary/Treasurer emails APS to update the fedexec@aps.org email list.

Jan 5 (or close) – April Meeting contributed abstract deadline. Program Committee should make sure all abstracts are in.

Jan 15 – Onboarding meeting - Agenda

- Introduce new executive committee members to their positions.

- Proposed Budget

- Update SOP

- Form committees.

- Give committees their charge and timeline.

- Charge for Membership Committee

- Set the dates for the other 2 meetings for the year.

- Vice-Chair needs to solicit APS Chief Executive Officer for appointee to Nominating Committee and give them 3-4 names for appointee.

- Chair-Elect needs to solicit the Executive Committee of the Forum on Outreach and Engaging the Public (FOEP) for their appointee to the Program Committee.

- Chair needs to appoint someone to FOEP's Program Committee and needs to appoint someone to the GPER executive committee (just exec. Committee meetings no sub committee work?).

Jan 25 (or close) – APS Leadership Meeting. Registration is open until November 17. Your unit should work together to select three officers to attend. Registration and housing are complimentary, and all reasonable travel expenses including economy airfare, ground transportation, and meals will be reimbursed.

Feb 1 – Newsletter Editor contacts Past-Chair, Chair, and Chair-Elect for articles for Newsletter.

March 5 (or close) – March Meeting. Chair-Elect and Chair attend meeting. Grad student can attend March or April meeting.

March 15 – Newsletter articles due from Past-Chair, Chair, and Chair-Elect.

April 5 (or close) – April Meeting. Chair-Elect and Chair attend meeting. Grad student can attend March or April meeting.

April 15 -- Secretary/Treasurer emails each committee with the following information:
Committee members

Committee charge
Important dates

April 15 – Award/Fellowships Committee should start soliciting for nominations for awards

April 15 – Spring Newsletter posted

May -- Program Committee – March Meeting sorting categories are due

May 1 – Secretary/Treasurer needs to send names to the Honors Nominations Coordinator (Delia Cruz Nochebuena in 2023) of the names, emails, and positions of the members of the Awards/Fellowships Committee.

May 15 (or close) – Executive Committee Meeting - Agenda
Awards/Fellowships Committee - Past-Chair - help with nominations
Program Committee - Chair-Elect - help with topics for Meeting
Financial Report - Treasurer
Newsletter Editor - ideas for Fall

June 15 – Program Committee submits topics for 2 FEd Focus Sessions and 1 Symposium Session for the March Meeting

July – Program Committee deadline to submit theme for April Meeting

July 1 – Newsletter Editor contacts Past-Chair, Chair, and Chair-Elect for articles for Newsletter.

July 15 – Program Committee receives nominations for the March Meeting sessions from APS

August 1 -- Nominating Committee solicits nominations from the membership

Aug 1 – Newsletter Editor receives articles from Chair, Chair-Elect, and Vice-Chair.

Aug 15 (or close) – Executive Committee Meeting - Agenda
Nominating Committee - Vice Chair - help with nominations
Financial Report - Treasurer
Newsletter Editor - ideas for Spring

September 1 – Program Committee sends APS the list of invited speakers for the March Meeting

October 1 – Secretary/Treasurer sends an email to current Mini-Grant recipients to:
Remind them about the November 15th deadline for spending the funds
Ask the Project Mini-Grant Recipients to send their email report and url link.

October 1 – Secretary/Treasurer sends forum post to FEd membership asking them to apply for Mini-Grants.

October 1 – Program Committee deadline for sorting categories for April Meeting

October 5 (or close) – March Meeting contributed abstract deadline. Program Committee should make sure all abstracts are in

October 15 – Fall Newsletter posted

October 15 -- Nominating Committee emails slate of candidates to Secretary/Treasurer and also to apsunits@aps.org. The slate of candidates includes the name of the candidate, their picture, their biographical information, and their candidate statement. Then, an APS employee will help upload the information to the online election portal. It usually takes 2 weeks to get the election materials up on the site.

October 15 – Secretary/Treasurer should also check the term of the Newsletter Editor to see if the Executive Committee needs to replace them.

October 31 – Programming Committee deadline for sessions and invited speakers for April Meeting

November 1 – Mini-Grant Deadline. Secretary/Treasurer distributes Mini-Grant applications to Mini-Grant Committee for review.

November 15 (or close) - Select 3 officers to go to the APS Annual Leadership Meeting.

November 15 - December 15 -- APS Fed Election

December 1 – Mini-Grant committee selects awardees and funding levels. Secretary/Treasurer sends emails to awardees and posts winners of Project Mini-Grants on the APS FEd website and to the FEd forum.

December 15 – Secretary/Treasurer will communicate results of the election to the APS and membership

Committee Positions

Committee appointments are below.

Honors/Awards - (4 people)

Lead - Past Chair
 Vice - Chair
 General and APS/AAPT member at large in 3rd year

Membership - (5 people)
 Lead - Chair
 Vice - Chair-Elect
 General and APS/AAPT member at large in 2nd year
 Secretary-Treasurer

Programming- (8 people)
 Lead - Chair Elect
 Vice - Vice-Chair
 1 person from FOEP
 Grad student member
 General and APS/AAPT member at large in 1st and 3rd year

Nominating - (5 people)
 Lead -Vice-Chair
 Vice - Past Chair
 1 person from APS exec comm.
 General and APS/AAPT member at large in 1st year

Mini-Grant- (3 people)
 Lead - Secretary/Treasurer
 Vice - Chair
 Chair elect

Appointee to FOEP - Member at Large - 2nd year
 Appointee to GPER – AAPT/APS Member at Large - 2nd year

	Honors	Membership	Program	Nominating	Mini-Grant	Appointee
Past Chair	X - Lead			X - Vice		
Chair	X - Vice	X - Lead			X	
Chair Elect		X- Vice	X - Lead			
Vice Chair			X - Vice	X - Lead		
Sec/Treas		X			X - Lead	
Councilor						
Member at			X	X		

large -1st						
Member at large - 2nd		X				To FOEP
Member at large - 3rd	X		X			
AAPT Member at large - 1st			X	X		
AAPT Member at large - 2nd		X				To GPER
AAPT Member at large - 3rd	X		X			
Grad student		X	X			
FOEP member			X			

Awards/Fellowships/Honors Committee

The Chair of this committee is the Past Chair and there are up to 5 additional members appointed by the Chair.

Committee Work:

The committee is in charge of three things: nominations to APS Fellow, selecting the Excellence in Physics Education Award, and selecting the Jonathan F. Reichert and Barbara Wolff-Reichert Award for Excellence in Advanced Laboratory Instruction.

APS Fellows – At the end of March, APS will email and give the total number of Fellows that FEd can allocate. The total number of Fellows is calculated at 0.5% of the non-student members of APS in that year. Forum allocations are calculated at 1 Fellow per 500 non-student members, rounded down. All units may submit 1 alternate Fellow selection, which may be allocated by the Committee on Fellowship in the event of unused Fellow slots. FEd allocation in March 2024 was 5 Fellows. For Fellows nominations:

1. Volunteer Availability: Depending on the number of nominations, a committee may require at least 1 to 3 months to review and deliberate.

2. Conflicts of Interest: Please refrain from inviting volunteers to a selection committee if you are aware that they are nominating someone for this award or if they are a nominee for the award.

3. Minimum of Three Reviewers: Each application must be reviewed by at least three unconflicted selection committee members. It is recommended that your committee is large enough to meet this requirement.

Important Dates:

April 15 -- Secretary/Treasurer emails each committee with the following information:

Committee members

Committee charge

Important dates

April 15 -- Award/Fellowships Committee should start soliciting for nominations for awards

May 1 -- Secretary/Treasurer needs to send names to the Honors Nominations Coordinator (Delia Cruz Nochebuena in 2023) of the names, emails, and positions of the members by May 1

June 1 -- Awards/Fellowships Committee needs to submit nominations of APS Fellows

June 1 -- Awards/Fellowships Committee have Reichert award and Excellence in Physics Education award close June 1

Members:

FEd Exec Committee decided that committee would in practice be the following 4 people:

Committee Chair - Past Chair FEd

Committee Vice Chair - Chair FEd

General and APS/AAPT member at large in 3rd year

Info from Bylaws:

1. **Fellowship Committee:** The Fellowship Committee shall consist of the Past Chair and up to five members appointed by the Chair, in consultation with the Past Chair, no later than May 1 of each year. All appointed members must be members of the Forum. The Past Chair shall serve as Chair of the Fellowship Committee. This Fellowship Committee shall solicit the nomination of candidates for Fellowship, review the qualification of such candidates, and report its recommendation to the Executive Committee for approval before the submission is made to the Head of the Honors program of the Society. The term of office for members of the Fellowship Committee shall be one year.

Program Committee

Chair-Elect is the chair of the committee. There is one member that shall be appointed by the Executive Committee of the Forum on Outreach and Engaging the Public. Chair-Elect should solicit them for their appointee after the Jan. 15th meeting. There is an early rate benefit offered to Invited Speakers who register for the meeting, and a Special Forum Rate offered to Session Chairs.

March Meeting:

By June 15th the committee submits the topics for 2 FEd Focus Sessions and 1 Symposium Session for the March Meeting to the APS. Then, the APS collects speaker nominations through July 15. The committee then looks through the nominations and can also nominate their own speakers. By September 1 (or close) the committee needs to send APS the list of Invited Speakers for the March Meeting sessions.

April Meeting:

Finding Speakers:

How do we find speakers? You can use the APS directory search, but that has limited searches. You can search the FEd directory as many times as you wish. You can look at our award winners for the [Excellence in Physics Education](#), [Reichert Award](#), [Award for Improving Undergraduate Education](#), [Past Award Winners](#) of the Mini-Grants, or our [APS Fellows](#). You can put out calls on the FEd forum for nominations during the time when the APS is gathering nominations.

Important Dates:

April 15 -- Secretary/Treasurer emails each committee with the following information:

- Committee members

- Committee charge

- Important dates

May – sorting categories are due for March Meeting

June 15 – Program Committee submits topics for 2 FEd Focus Sessions and 1 Symposium Session for the March Meeting

July – deadline to submit theme for April Meeting

July 15 – Program Committee receives nominations for the March Meeting sessions from APS

September 1 – Program Committee sends APS the list of invited speakers for the March Meeting

October 1 – Program Committee deadline for sorting categories for April Meeting
October 5 (or close) – March Meeting contributed abstract deadline
October 31 – Programming Committee deadline for sessions and invited speakers for April Meeting
January 5 (or close) – April Meeting contributed abstract deadline
March and April of the following year – Attend the meeting.

Members:

FEd Exec Committee decided that committee would in practice be the following 8 people:
Chair of Committee - Chair Elect FEd
Vice Chair of Committee - Vice-Chair FEd
1 person from FOEP
Grad Student Member
General and APS/AAPT member at large in 1st and 3rd year

Info from Bylaws:

1. **Program Committee:** The Program Committee shall consist of the ChairElect, and up to nine members appointed by the Chair, in consultation with the Chair-Elect, no later than June 1 of each year. In addition, one member shall be appointed by the Executive Committee of the Forum on Outreach and Engaging the Public. The Chair-Elect shall serve as the Chair of the Program Committee. The Chair-Elect will remain Chair of the Program Committee until the April Meeting which he or she planned is complete. The Program Committee shall be responsible for the solicitation and selection of invited papers for Forum sponsored sessions at meetings of the Society and for the arrangement of the programs of such meetings. The term of office for members of the Program Committee shall be one year.

Article IX - Programs and Activities

1. The Program Committee shall work with the Society Director of Meetings, or his or her designee, in arranging Forum-sponsored sessions at meetings of the Society. This activity shall include the scheduling of invited and contributed papers at meetings of the Society and organizing of Forum-sponsored conferences. The programs of the Forum shall be developed in consultation with the Committee on Education and AAPT as appropriate.

Nominating Committee

The nominating committee is chaired by the Vice-Chair. The APS Chief Executive Officer appoints one member. The Vice-Chair should solicit them for their appointee after the Jan. 15th meeting. To do that, APS says: “we need you to provide your unit's 2024 Nominating Committee membership roster, as well as a short-list of members (3-4 individuals) who could serve to broaden the committee's reach and whose sphere of influence might help to identify potential leaders to stand for unit election.”

More information can be found at the [APS Election Manual](#).

Committee Work:

Electing APS Councilor: Every three years we need to elect an [APS councilor](#). [Pdf](#) describing what APS councilors do. From APS: “Understanding what is required of this position helps your unit members make an informed decision on whether they have the interest and time it takes to be an engaged participant of the APS Council. Unit Executive Committee members should also understand the Councilor's responsibilities and the major role they play in communicating your unit's needs, perspectives, and ideas with APS leadership. You are encouraged to circulate the [pdf] document to your Unit Executive Committee.” This Councilor is a FEd member, elected by FEd. If the other groups get bigger (FOEP is close), they can have their own Councilor. But, FEd Councilor is “assigned to GPER and FOEP” as well. It would be good to ask GPER and FOEP for input at the nominating stage.

Important Dates:

Jan 15 -- Vice-Chair needs to solicit APS Chief Executive Officer for appointee to Nominating Committee and give them 3-4 names for appointee.

April 15 -- Secretary/Treasurer emails each committee with the following information:

- Committee members

- Committee charge

- Important dates

May 15 -- solicit nominations from the membership by email or newsletter or both by this date!

June – Meet with committee to select names from the nominations and to drum up more nominations as needed.

August – Meet with committee again to finalize nominations (at least two per slot, people can only run for one slot). Then, have committee work together to solicit the name of candidate, picture, bio information, and candidate statement.

September 15 -- email slate of candidates to Secretary/Treasurer and also to

apsunits@aps.org. The slate of candidates includes the name of the candidate, their picture, their biographical information, and their candidate statement. Then, an APS

employee will help upload the information to the online election portal. It usually takes 2 weeks to get the election materials up on the site.

November 15 - December 15 -- APS Fed Election

December 15 – Secretary/Treasurer will communicate results of the election to the APS and membership

From APS Jun 5, 2024

I am reaching out to let you know that the 2025 FEd Executive Committee term will begin on January 1, 2025. This means that ideally the FEd Election will be concluded by no later than this November. There are several steps that will need to take place so that we can ensure a smooth executive committee transition at the start of the year, so I will put a tentative timeline below so you know what to expect:

Election Process Timeline

- **Assemble Nominating Committee - Now**
 - If you have not already done so, please reach out to Jeanette Russo (russo@aps.org) with a list of 2 - 3 candidates that she can review for the APS Appointed Member of the Nominating Committee.
- **Solicit Executive Committee Nominations - July 1, 2024**
 - You can submit an email request to send to members through the [Unit Service Desk](#) and also have it posted to the Engage Featured News.
- **Nominating Committee Finalizes Candidates - September 1, 2024**
 - Each candidate will need to submit a brief statement of intent and biography (see [example](#)).
- **Initialize Election Site - September 15, 2024**
 - Reach out to me when the candidates are gathered and I will assist with this step.
- **Review Election Site - September 27, 2024**
 - Test ballots can be scheduled, and submit an Election Announcement via the [Unit Service Desk](#).
- **Election Site Opens - October 7, 2024**
 - Ballots will be sent to all current FEd members.
- **Election Site Closes - October 25, 2024**
 - The day after the site closes I will update our database with the election results.
- **Notify Candidates of the Election Results - November 6, 2024**
 - Email all candidates who participated and let them know whether they were elected, or encourage them to participate again next year.
- **Notify Membership of the Election Results - November 12, 2024**
 - Email can be submitted through the [Unit Service Desk](#).
- **Executive Committee Term Turnover - January 1, 2025**
 - All expiring committee members terms will end December 31, 2024
- **Update Executive Committee Email Alias - January 15, 2025**

- Let me know what email addresses the new committee members would like to have included on the email alias fedexec@aps.org.

Typically the Secretary/Treasurer or Past Chair will take on the role of Election Admin, but to confirm you can review your Unit Bylaws (<https://engage.aps.org/FEd/governance/bylaws>). I have put together an [Election Manual](#) which you can review if you have any questions, or feel free to reach out to me. Please let me know where you are at with the FEd Election process right now so I will know how better to assist you along the way.

Members:

FEd Exec Committee decided that committee should in practice be the following 5 people:

Chair of Committee -Vice-Chair FEd

Vice Chair of Committee - Past Chair FEd

1 person appointed by APS Chief Executive Officer.

General and APS/AAPT member at large in 1st year

Info from Bylaws:

The Nominating Committee shall consist of the ViceChair, and at least two members appointed by the Forum Chair, in consultation with the Vice-Chair, no later than August 1 of each year. All appointed members must be members of the Forum. The APS Chief Executive Officer shall be invited to appoint one member to the Nominating Committee. The Nominating Committee shall prepare a slate of candidates for election to the Executive Committee in accord with Article VII of these Bylaws. The term of office for members of the Nominating Committee shall be one year.

1.

- Nomination Procedure:** The Nominating Committee is responsible for preparing a slate of candidates for each year's election. No later than August 1 of each year, the Vice-Chair shall invite, via email or the Forum newsletter, all Forum members to suggest candidates for all positions that will be elected that year. If as many as twenty-five members of the Forum, or 1% of the membership, whichever is larger, suggest the same person for the same office by October 1, that person shall be deemed nominated. The Nominating Committee, taking into account suggestions received from members, shall nominate at least two candidates for each open position. The Nominating Committee shall consult with the Chair before submitting the nomination of any candidate for a consecutive term. The Nominating Committee shall submit the slate of candidates to the Secretary-Treasurer not later than October 15 of each year.

- b. **Balloting Procedure:** The Secretary-Treasurer shall distribute election ballots to all Members, electronically and/or by mail, not later than November 15 of each year, setting a closing date four weeks after balloting has commenced. Ballots shall be returned to and counted by the Secretary-Treasurer or his or her designee. The election shall be decided by a plurality of those voting. If there is a tie, the Executive Committee shall decide the election, with the Chair voting only in the case of a tie among the other Executive Committee members. The Secretary-Treasurer shall communicate the results of the election to the Executive Committee and to the Society Corporate Secretary before January 1.
 - c. **Procedures For Members-At-Large:** The six General and APS/AAPT Members-At-Large shall be elected by the membership for three-year staggered terms in two equal categories, General Member-At-Large and APS/AAPT Member-At-Large, of three members each. The Graduate Student Member-at-Large shall be elected for a two-year term.
2. **Terms of Office of the Executive Committee:** The tenure of the members of the Executive Committee shall begin at the beginning of the calendar year following their election.
- a. **Vice-Chair:** The Vice-Chair shall be elected by the membership for a one year term and shall successively become Chair-Elect, Chair, and Past Chair in the following years. The Chair shall not be eligible for the Vice-Chair office for four years after service as Past Chair.
 - b. **Secretary-Treasurer:** The Secretary-Treasurer shall be elected by the membership for a term of three years and may not serve more than two consecutive terms.
 - c. **Forum Councilor:** The term of office of a Forum Councilor shall begin at the beginning of the calendar year following his or her election. The Forum Councilor shall serve for a term of four years and may not serve more than two consecutive terms.
 - d. **Members-At-Large:** Each General and APS/AAPT Member-At-Large shall be elected by the membership for a term of three years and may not serve more than two consecutive terms. The tenure of a Member-At-Large of the Executive Committee shall terminate in the event of his/her assumption of a post as an Officer of the Forum, either through election or appointment, and the unexpired portion of his or her term shall be filled as hereinafter provided for a vacancy. The Graduate Student Member-at-Large shall be elected by the membership for a term of two years and may not serve a second term.

Info from APS Honors Task Force 2022

- Nominations must undergo review by a minimum of three reviewers, and nominations cannot be deferred.
- If a selection committee cannot reach a unanimous decision on addressing a conflict of interest, the conflicted member(s) must be recused from scoring and discussing the related nomination(s).
- Units lacking a chair and vice chair continuity process for their Honors selection committees should establish a procedure ensuring information continuity. If you would like support from APS staff, please reach out to us at honors@aps.org.
- Selection Committee members must not actively seek or promote specific nominations for the honors they will evaluate.
- The selection committee chair's default role is that of convener. Your unit's bylaws may specify the committee chair's role.

We would also like to highlight that the new and improved [Selection Committee Guidelines and Resources](#) manual includes checklists for both the Executive and Selection Committees.

Membership Committee

The Chair is the chair of the Membership Committee. Additional members are the Graduate Student Member-at-Large and other Members-at-Large appointed by the Chair. Secretary/Treasurer helps with this committee. This committee does not have set responsibilities. So this committee can work on things that arise on timelines that seem reasonable. For example, if there is some interest in updating the logo, updating the FEd Flyer, creating buttons/pins etc. This committee can work on these projects.

Important Dates:

Jan 15 - Onboarding Meeting -- receive charge from Executive Committee

Members:

FEd Exec Committee decided on following 6 members:

Chair of Committee - Chair FEd

Vice Chair of Committee - Chair-Elect FEd

Grad student member

General and APS/AAPT member at large in 2nd year

Secretary Treasurer

Info from Bylaws:

1. **Membership Committee:** The Membership Committee shall consist of the Chair, the Graduate Student Member-at-Large, and General or APS/AAPT Members-at-Large in the second or third year of their term. The Chair may change the composition of the Committee if desired. The Membership Committee is tasked with addressing special requests from the members and with creating and implementing initiatives to increase Forum membership.

Mini-Grant Committee

The Mini-Grant committee is chaired by the Secretary/Treasurer. This is not a committee that is in the Bylaws. This is an ad-hoc committee that the Executive Committee has instated to read and review the Mini-Grant Applications. There are three other members of the Mini-Grant Committee: the Chair, the Chair-Elect, and an optional fourth member appointed by the Chair.

Members:

FEd Exec Committee decided that the Mini-Grant Committee would in practice have the following 3 members:

- Chair of Committee - Secretary/Treasurer
- Vice Chair of Committee - Chair FEd
- Chair Elect FEd

Collecting Mini-Grant Reports:

Secretary/Treasurer contacts past awardees to get their final report and their url link on October 1st. This url link should be added to the [Past Awardee website](#) by filling out the [Website Request Form](#).

Soliciting and Awarding Mini-Grants:

Committee meets by email. The first email is to solicit if there are any updates that need to be made to the [Mini-Grant website](#) or the [Mini-Grant Application Form](#). The Mini-Grant Application Form creates a spreadsheet with the applications. You can see each Mini-Grant applicant, the Mini-Grant #, their first and last name, whether they are applying for a personal or project Mini-Grant, etc. There are also pdf's of the project and personal Mini-Grant proposals in the spreadsheet.

The second email is to tell the committee that the Mini-Grant deadline is closed and to solicit reviews on the [Mini-Grant Reviewer Form](#). Committee members rank the proposals from 1-5 (with 5 being the best) on each of the three criteria (timeliness, impact, and additional

considerations). This means that each proposal gets three 1-5 rankings from the three committee members. These 9 numbers are averaged together to give the proposal a score. In 2023, we funded everyone (Project and Personal Mini-Grants) with a score above a 4. In addition, on this form, the committee members are asked to select a funding level for the proposal (1 is 0% funding, 2 is 25% funding, 3 is 50% funding, 4 is 75% funding, and 5 is 100% funding). This funding level is averaged between the three committee members. The average funding level is the funding level for the project. The Secretary/Treasurer then makes a preliminary list of each awardee and the funding level. If there is money left over, then increase the percentage of funding to each Project Mini-Grant by the percent that is left over. If there is not enough money, then increase the average score that would get funded.

For reference, in 2020 the personal mini-grants that were fully funded were \$750 and the fully funded project mini-grants were \$3500. We had 39 applicants and we funded 22 of them and spent \$35,000. We funded all of the personal mini-grants at a funding level of 50-100% and 10 of the project mini-grants at 10-100%. In 2023, the fully funded Personal and Project Mini-Grant values were the same as 2020. We had 16 applicants and spent \$10,000. We had 8 applicants for Personal Mini-Grants and 8 applicants for Project Mini-Grants. We funded 4 Personal Mini-Grants all at the 50% mark (\$375). We funded 5 Project Mini-Grant applicants at the 30-60% level. We actually had about \$1600 left over that we hadn't awarded. We decided that it was best to split these funds amongst the Project Mini-Grants in the hopes that the people might actually be able to do their projects with the money they were given.

The third email is from the Secretary/Treasurer on the outcome of the reviews. This email contains a preliminary list of the awardees and the funding level for each awardee. If the committee agrees to the preliminary list, then the Secretary/Treasurer will notify the awardees and update the [Past Awardee website](#) and the FEd Forum with the Project Mini-Grant awardees. Otherwise the committee should have a meeting to choose the awardees and funding levels.

Important Dates:

October 1 – Secretary/Treasurer sends an email to current Mini-Grant recipients to:

- Remind them about the November 15th deadline for spending the funds

- Ask the Project Mini-Grant Recipients to send their email report and url link.

October 1 – Secretary/Treasurer sends forum post to FEd membership asking them to apply for Mini-Grants.

November 1 – Mini-Grant Deadline. Secretary/Treasurer distributes Mini-Grant applications to Mini-Grant Committee for review.

December 1 – Mini-Grant committee selects awardees and funding levels. Secretary/Treasurer sends emails to awardees and posts winners of Project Mini-Grants on the APS FEd website and to the FEd forum.

Information sent to Mini-Grant Awardees

Newsletter

The Newsletter Editor solicits and collects articles for the newsletter and then submits them to the APS editing staff who format a PDF version of the newsletter according to an APS template. The process of submitting articles to APS has changed multiple times, but currently it is the Jira system and done by using the [Unit Newsletter Request](#). Typically ~3-4 weeks before the deadline the Editor will contact members of the executive committee about newsletter contributions and provide samples (usually there is a "from the chair" piece, but then the others vary on whether it is a call for nominations or information from programs chair about upcoming sessions at APS). The APS Head of Education and FEd Councilor also frequently contribute to the newsletter.. There is a teacher preparation section editor, and that individual contacts people to contribute articles for that section and sends those articles to the Editor. In addition to that, the Editor can solicit additional articles that may be of interest to readers. For example, there was a themed issue on the EP3 guide in 2022. After receiving a PDF proof from the APS editing staff, the Editor corresponds with authors to check for remaining edits and communicates those edits to APS before confirming that the newsletter is finalized. Information about typical timing is provided on [this site](#).

We used to have a Spring, Summer, and Fall Newsletter but went to a Spring and Fall format in 2022. The following Executive Committee members contribute to the Newsletter:

Past-Chair – article calling for nominations for awards (Spring)

Chair – Letter from the Chair (every issue)

Chair-Elect – article for speaker nominations (was Summer, now Spring)

article on the March and April meeting sessions (Fall)

Vice-Chair – article asking for nominations for Executive committee (was Summer, now Fall)

Important Dates:

Feb 1 – Newsletter Editor contacts Past-Chair, Chair, and Chair-Elect for articles for Newsletter.

March 1 – Article deadline

April 15 – Spring Newsletter posted

July 1 – Newsletter Editor contacts Chair, Chair-Elect, and Vice-Chair for articles for Newsletter.

Aug 1 – Article deadline

Oct 15 – Fall Newsletter posted

(Dates for Newsletter used to be: send a request by Jun 1, Oct. 1, Jan 15)

Newsletter Visibility

Currently, the Editor clicks a button in the newsletter request form to send the Newsletter to all of the email addresses in the Forum. It was mentioned that writers of articles should be asked to submit Discussion Forum posts about their articles (and direct people to newsletter).

Info from Bylaws:

1. **Newsletter**

- a. The Forum shall publish a Newsletter and distribute it electronically to all members of the Forum and the Council. The Newsletter shall carry the Annual Report of the Chair, articles of interest to the Members, and letters and comments from Members of the Forum.
- b. The Editor of the Newsletter shall be elected by a majority vote of the Executive Committee for a term of three years. The performance of the Editor of the Newsletter shall be reviewed by the Executive Committee after completion of his or her second year.

Timeline:

Up to 6 – 8 weeks before deadline: make plans for content of issue, send e-mails soliciting articles from appropriate authors (Beth Cunningham, Michael Wittmann, or Monica Plisch can often give good advice about whom to contact).

Time required: up to two hours for drafting emails, plus brainstorming time (all times in this document are approximate and will vary for each newsletter)

Two weeks before deadline: send reminder e-mails to Executive Committee members for their contributions, as follows:

Chair of the FEd: Letter from the Chair; solicitations for awards

Chair-elect (Chair of the Program committee): Information about FEd sessions at the March and April meetings; usually there is a short announcement in the Fall newsletter and an extended listing of all speakers in all sessions in the Spring newsletter, which should appear shortly before the March meeting.

FEd Vice-Chair (Chair of the nominating committee): for information about elections and soliciting nominees

Chair of the Committee on Education: for any announcements from the COE

Michael Wittmann (APS Head of Education) for an update
Check in with editor of the Teacher Prep Section (currently

Alma Robinson) to see how their sections are progressing
Time required: about an hour

Deadline for articles to two weeks post-deadline: read submissions as they are received (in addition to articles that the editor may have solicited, this could include unsolicited articles and letters to the editor, which should be evaluated for quality and relevance to the readership of the FEd), make any edits necessary and return to the authors for approval (usually grant at least a one-week extension on submission deadlines, as necessary, and then allow additional time for turn-around on edits); Formatting edits are typically not necessary – they are handled by APS.

Time required: about 4 hours distributed across two weeks

Up to three weeks post-deadline: write Letter from the Editor, if desired.

Time required: 1 – 2 hours

Approximately three weeks post-deadline: Assemble all articles (word format) ordered with numbers into a shared Google Drive folder. Submit the newsletter request form through the [APS Service Desk site](#) which includes a link to the shared Google Drive folder and the draft e-mail text that will be sent to members once the newsletter is finalized. APS has changed this submission process many times.

Time required: ~1 hour

Approximately one month post-deadline (7-10 days after the newsletter request is submitted): receive proof of newsletter from APS by e-mail. Forward to individual contributors for proof-reading of their contributions. Proof-read yourself. Forward to Chair (to be sent to entire Executive Committee) for commentary.

Time required: 0.5 to 1 hour

Approximately 5-7 days after receiving proof: Assemble all proof-edits into a single document (can submit lists of edits directly in an e-mail or mark up the proofs themselves) and return to APS.

Time required: ~ 1 hour depending on edits

Approximately two weeks after receiving proofs: APS will ask whether the newsletter is finalized and approved by you before sending an e-mail to the membership.

Total approximate time commitment per newsletter: ~8-10 hours, spread across a few months.

Duties:

The following information provides guidance for newsletter editors to ensure the timely production of the newsletters and to ensure appropriate and consistent content and format. It also includes general guidance about newsletters.

1. Vacancies: It is the responsibility of the FEd chair to ensure that there are newsletter editors during their tenure and the year after their tenure.

2. Deadlines: Newsletters are published in the spring and fall online to the Engage website. Articles for the spring newsletters are generally solicited 4-6 weeks (6 weeks is preferred, 4 weeks is the final deadline) before April 15. The fall newsletter should be completed in September or October.

3. Content: Newsletters are usually either themed or non-themed depending on the newsletter editor's interests. A themed newsletter mainly includes articles about a certain topic or from a certain workshop. An example of the first is the summer 2007 newsletter about K-12 science education. An example of the second is the fall 2010 newsletter that was mainly about the Gordon Conference on Experimental Research and Labs in Physics Education. In non-themed newsletter, each article is independent.

There are standard components to the newsletter as well. This includes the "From the Chair" article which is written by the current chair, though there could be others depending on the Editor's vision for the newsletter. The newsletter editor should ensure that these articles are submitted in a timely fashion. The newsletter may include an article "From the Editor" at their discretion.

Another standard section is the Teacher Preparation Section, which includes an introduction by the section editor and articles that they solicit. The newsletter editor should interact with the section editor to determine the articles that will be included in this section.

The final section of the newsletter consists of a listing of the Executive Committee of the FEd, which should include the name, date, and affiliation of each voting member. It should also include the name and affiliation of each non-voting member, as well as the next 2 newsletter submission deadlines. See previous newsletters for the standard format.

You should use your knowledge of the field and your contacts to solicit articles that you think are appropriate for the newsletter. You also might get articles or letters to the editor that are sent to you that are not solicited, though this is rare.

The newsletter editor should also contact the following for potential short articles that pertain to ongoing FEd related activities:

- FEd Chair-elect, chair of the program committee, for information related to the March and April meetings or soliciting session topics.
- FEd Vice chair, chair of the nominating committee, for information related to the election, nominees, or soliciting nominees.
- FEd Past chair, chair of the fellowship committee, for soliciting new nominations for fellowship or for acknowledging new fellows. The deadline for submission for FEd fellowship is April 1.
- FEd Chair, for soliciting candidates for the APS Excellence in Physics Education Award (submission deadline is July 1) and the COE Award for Improving Undergraduate Physics Education (application deadline is July 15).

- Chair of the Excellence in Physics Education Award selection committee for writing an article on the award winners after the award is announced. The chair of the selection committee is available at: <http://www.aps.org/programs/honors/awards/education.cfm>
- Chair, APS Committee on Education, for writing an article on the winner of the COE award for Improving Undergraduate Physics Education after the award winners are announced, or for providing an update on COE activities.
- APS Director of Education and Diversity for providing an update on APS education activities.

If there are any controversial articles or letters to the editor that are submitted, the editor should forward that input and their opinion to the chair for advice on how to proceed. The chair may request the input of the chair line and Secretary/Treasurer or the entire Executive Committee for advice.

4. Format: Each article should include a title and the author's name at the top of the article. The bottom of the article should include the author's affiliation, their email address if they are willing to provide it, and if they wish, a short description of themselves or their interests in physics education. See previous newsletters and examples below.

Example 1: Dean Zollman is William & Joan Porter University Distinguished Professor and Head of Physics at Kansas State University. He was the AAPT Millikan Medalist in 1995, Carnegie National Professor of the Year in 1996, and NSF Distinguished Teaching Scholar in 2004. He has conducted research in physics education since 1972.

Example 2: Jean P. Krisch is Professor of Physics and Arthur F. Thurnau Professor at the University of Michigan in Ann Arbor, MI.

Example 3: [William Goffe](#) is an economist in the Department of Economics at SUNY Oswego. While an economist, he became interested in PER after two other economists (Mark Maier and Scott Simkins) sent him a paper they had written on PER as well as Carl Wieman's "Why Not Try a Scientific Approach to Science Education?" (Change, September/October, 2007). He was deeply impressed and feels that PER has much to offer other teachers in higher education. Besides research in economic education, he has also published in computational economics and in how economists can best use the Internet. He is an associate editor of the Journal of Economic Education.

The length of articles should be comparable to those in previous newsletters; authors should be encouraged to look at previous newsletters for examples of appropriate length and style.

5. Submission and Review: After the articles have been submitted to the Editor, in Word format, they will compile them into a shared Google Drive and complete the APS Unit Newsletter Request Form. After the first draft of the publishable format is completed by the APS editing staff, it is sent by e-mail to the FEd Newsletter Editor. The Editor will then send the draft to contributors and the Executive Committee for corrections. These corrections are to be sent to the Editor, who will assemble all of the corrections into a single document. These corrections will then be sent back to the APS editing staff for incorporation into the final publishable document.

6. Distribution: After the newsletter has been “approved” by the Editor and posted on the FEd newsletter web site, the APS editing staff generate an e-mail to the membership based on the template submitted in the APS Unit Newsletter Request Form.

Rotation of the Newsletter Editor

Newsletter Editor terms last three years (although this has varied quite a bit in the past) and an Editor can serve two terms. In January of the last year of the Newsletter Editor’s position, the Chair of the FEd Executive Committee should seek nominations for a new Newsletter Editor. The Chair could also solicit the FEd as a whole for nominations or self-nominations using the Discussion Forum. Then, the Chair emails these nominees and solicits one-page descriptions of the candidate’s qualifications, why they are interested in the position, and their vision for the newsletter or their ideas about the newsletter. They also provide the nominees with 1) the duties of the Newsletter Editor and 2) the timeline for the position (see below). Next, the executive committee reviews the applications and makes a selection by June. After the selection, the new Newsletter Editor shadows the current Newsletter Editor on the Fall Newsletter. The current editor can cc the new editor on all the emails they send and walk them through how to solicit articles and submit the newsletter to APS. The new Newsletter Editor takes over on the spring newsletter the following year.

Call for a FEd Newsletter Editor

Apply to be our FEd Newsletter Editor! The [Newsletter](#) is a publication of the American Physical Society Forum on Education (FEd), presenting news of the Forum and articles on issues of physics education at all levels. This is where physics education practitioners meet physics education researchers. The [Newsletter Editor](#) solicits and collects articles for the Newsletter and then submits these articles to the APS editing staff who format and distribute the Newsletter. To apply to be the FEd Newsletter Editor, email the [Chair of FEd](#) by April 30th to receive application details.

Why apply? This is a great position If you are interested in developing a network within the APS of both instructors and researchers. You work with people at FED, FOEP, GPER, AAPT, ALPhA, PICUP, and more! You would also stay up to date on the latest physics education topics and would have a hand in promoting them. Some past Editors have taken the position as a way to stay active nationally, either for pre-tenure or post-tenure reviews. Other Editors might take the position if they have a specific vision for the Newsletter.

What is the workload? Newsletter Editors serve a term of 3 years and can serve up to two terms. There are two newsletters per year. The Editor solicits and edits articles for the Newsletter and then submits them to APS staff. Each Newsletter requires 8-10 hours of work spread over a few months. The Newsletter Editor also attends three FEd Executive Committee meetings per year. For more

information on the timeline and duties of the Newsletter Editor see our [Newsletter Operating Procedures](#).

Secretary/Treasurer

The Secretary/Treasurer is responsible for the finances, meeting minutes, website, and general running of the FEd. The [APS Unit Handbook](#) is a good place to start to read about the procedures for units. As Treasurer, they approve all transactions from the FEd account and create the Budget for the year. As Secretary, they record the minutes from all of the Executive Committee Meetings, meet with the chair to plan those meetings, and serve on the Mini-Grant and Membership Committees. In addition, they serve as a contact for the unit, ensure that the unit is meeting the deadlines set in the Timeline, and post announcements in the Discussion Forum from the Executive Committee.

Budget

The Secretary/Treasurer meets with the Chair during early January to create a proposed budget for the year. This Budget is discussed/approved at the Jan. Onboarding Meeting.

Financial Reporting at Executive Committee Meetings

The Secretary/Treasurer reports on the finances for the unit at the Executive Committee Meetings. The FEd is given \$20,000 per year to spend on programming. If the total account exceeds \$50,000, then the unit doesn't receive the \$20,000 allotment. Fiscal year is January to January. Financial Reports are on the Engage website under the [Communities Section](#). Go to the [Libraries](#) part of that website and then click on "Finance" in the folders section to see all of the monthly unit reports. Make sure you are logged in to the website to view the page. Usually reports come out 1.5 months after the last day of the month, so the January report should be available in mid-March. Often, the January, February, or even the March report will come out and will not have the correct "year end" numbers. Specifically, the dollar amount leftover in the account from the previous year will not forward in the report. For example, if there is \$38k left in the account at the end of December, then the January report might only show \$20k (the yearly transfer amount) rather than \$58k (balance forward + yearly transfer amount). If the account at the end of December has \$74k, then the January report will show \$0 (no yearly transfer) rather than the \$74k (balance forward). Eventually, the year end will close and the balance will forward. The Secretary/Treasurer should create budgets as if this number will forward.

Expense Reimbursement

To process a reimbursement, the person that would like to be reimbursed needs to send an email to accountspayable@aps.org with the [Accounting Forms](#) filled out and cc the Secretary/Treasurer. Then, the Secretary/Treasurer responds with a line that they approve the reimbursement. Reimbursements will come in from Mini-Grant Awardees, Committee members attending the March or April Meetings, invited speakers who can reimburse their registration to the March or April Meetings, or items from other initiatives. The accounting form to reimburse travel is done using the [Travel Reimbursement Form](#). To purchase something from a vendor or to reimburse a person who makes a vendor purchase, you will need to use the [Payment Request Form](#). This form requires an invoice or a receipt. To pay a salary to an individual, APS would need a [Payment Request Form](#) and a W-9 and Direct Deposit Form from each person receiving a payment (these can be sent directly to accountspayable@aps.org if they prefer).

Emailing the FEd list or Executive Committee

To email the entire FEd email list use the [Discussion Forum](#). If you submit a post to, then an APS employee must approve it before it goes out to the membership (usually 2-3 days). If you use the #FeaturedNews hashtag then the post will show up in the Featured News area as well.

To email the Executive Committee, use the fedexec@aps.org email list. You will need to update this email list before you use it—hopefully in January. To update the email list, send the information from the [APS Executive Committee](#) webpage after it has been updated from the election to apsunits@aps.org.

Minutes for the Meetings

The Secretary/Treasurer is in charge of the [Minutes](#). These minutes are currently on a crowdsourced Google Doc. They contain the minutes of the Executive Committee Meetings and the minutes of the meetings between the Chair and the Secretary/Treasurer. Secretary/Treasurer makes sure to take minutes during the meeting in addition to the crowd sourcing.

Website Update

The Secretary/Treasurer should add information to the website as needed and keep information up to date on the [FEd Engage Website](#). To submit a request to update the website go to the [Website Request Form](#).

Serving on Subcommittees

The Secretary/Treasurer serves on the Membership Committee as a help to the Chair. This Committee responds to Member requests which often come to the Secretary/Treasurer and are followed up by the Secretary/Treasurer. Secretary/Treasurer also Chairs the Mini-Grant Committee. The Mini-Grant Committee solicits and reviews applications in November/December. Then, award winners process their receipts all year long.

Meetings

The Chair presides over the Executive Committee Meetings and sets the Agenda. The Secretary/Treasurer polls the Executive Committee for when to meet. It may be advantageous to set the meeting times for the year at the Onboarding Meeting. The bare minimum is probably three meetings (Jan 15, May 15, and Aug 15 or close). The Agenda for these three meetings will contain at least the items listed below. The Meetings are over zoom and attendance at the March and April Meetings is not necessary. The Chair and Chair-elect (who were on the Programming Committee the previous year) should plan on attending the meeting and will be reimbursed. The grad student member can be reimbursed for attending the meeting as well. [In pre-pandemic times, the meeting schedule was January (onboarding meeting on zoom), February (zoom meeting to do last minute prep for March and April meetings), March Meeting (in person), April Meeting (in person), Summer (planning March Meeting and April Meeting sessions and nominating people to be on committee), and early Fall (if necessary).]

Important Dates:

Jan 15 – Onboarding meeting - Agenda

- Introduce new executive committee members to their positions.
- Proposed Budget
- Update SOP
- Form committees.
- Give committees their charge and timeline.
- Give Membership Committee their charge.
- Set the dates for the other 2 meetings for the year.
- Vice-Chair needs to solicit APS Chief Executive Officer for appointee to Nominating Committee.
- Chair-Elect needs to solicit the Executive Committee of the Forum on Outreach and Engaging the Public for their appointee to the Program Committee.

- May 15 (or close) – Executive Committee Meeting - Agenda
Awards/Fellowships Committee - Past-Chair - help with nominations
Program Committee - Chair-Elect - help with topics for Meeting
Financial Report - Treasurer
Newsletter Editor - ideas for Fall
- Aug 15 (or close) – Executive Committee Meeting - Agenda
Nominating Committee - Vice Chair - help with nominations
Financial Report - Treasurer
Newsletter Editor - ideas for Spring

Attendance at March/April Meetings

Meetings are held virtually on zoom. However, FEd does pay for certain members to attend the March/April meeting: Chair, Chair-Elect, and Graduate Student Member. See [Expense Reimbursement](#) for how to get reimbursed.

Bylaws Information:

1. **Executive Committee Meetings:**

- a. The Executive Committee shall meet at least once each year at a meeting called by the Chair of the Forum.
- b. If at least four voting members of the Executive Committee submit a request in writing to the Chair to convoke a meeting, the Chair must do so within sixty days.
- c. A quorum shall consist of six voting members of the Executive Committee, two of whom shall be Officers.
- d. The Chair may conduct Forum business and hold a vote of the Executive Committee by mail, electronic mail, phone, or other means on issues that require attention in the time between annual meetings.

Councilor

We have a Councilor who is a FEd member and is elected by FEd. Currently, our councilor also represents GPER and FOEP.