

# CMB-S4 Speaker and Publication bylaws revision

March 2020

## DRAFT REVISION

*Revisions are marked by this color*

### 9 Publication and Speakers Policy

#### 9.1 Principles

This policy seeks to ensure an equitable distribution of credit for work in the CMB-S4 Collaboration, to encourage and incentivize active work by Collaboration members, and to ~~guarantee that~~ ~~ensure~~ the resulting publications are of high quality. The authorship policy of the American Physical Society (2002) states: “Authorship should be limited to those who have made a significant contribution to the concept, design, execution or interpretation of the research study. All those who have made significant contributions should be offered the opportunity to be listed as authors.”<sup>1</sup>

The Publication Policy will apply to all projects and publications that employ Collaboration resources, including unreleased data, simulation codes and products, hardware and software engineering designs, and analysis pipelines. All Collaboration members agree to the publication policy upon joining, and to be bound by it for two years after leaving the Collaboration.

~~The Publication and Speakers Committee will continue to refine the policy, and present a revision no later than March 1, 2020 for ratification by the Voting Members of the Collaboration.~~

#### 9.2 Organization

The execution of the policy shall be overseen by the Publication and Speakers Committee and its subcommittees (§??). The Science Council (§??), ~~with input from technical and project committees, has authority to approve~~ projects that may lead to publications ~~or other products~~. Also, in carrying out its duty to produce a coherent plan for advancing the Collaboration’s key science goals,

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<sup>1</sup>[https://www.aps.org/policy/statements/02\\_2.cfm](https://www.aps.org/policy/statements/02_2.cfm)

the Science Council ~~shall establish~~ ~~establishes~~ a slate of project categories and ~~solicits~~ the Working Groups for detailed proposals. This is done in consultation with the ET and in accordance with the Spokespersons' yearly plan. The Spokespersons will help to navigate and resolve potential conflicts. The Membership Committee will keep track of active Collaboration members and Legacy Members for the purposes of establishing author lists for papers.

### 9.3 Project Proposal Process

Any Collaboration member may propose a Collaboration research project to an appropriate Analysis Working Group or Technical Working Group ~~by contacting the working group coordinators. If no working group is appropriate, the proposal may go to the Science Council directly via the chairs.~~ Such a project is work that is intended to result in a journal publication after a fixed term, a small set of related publications, ~~or similar product.~~ There are three categories for projects:

1. ~~Projects that are designated as~~ "Key Projects" represent the main science goals of the Collaboration (or forecasts for what we will achieve), where the Collaboration must speak with a single voice.
2. "Non-key" ~~analysis~~ projects represent other science goals and use Collaboration science data.
3. Other forecasts and technical reports are Collaboration-vetted projects that do not require Collaboration science data and may lead to a publication or conference proceeding.

The Science Council will maintain the list of Key Science topics, to be established prior to any projects being initiated. Topics can be added to the Key Science paper list and reviewed in coordination with the Publication Board.

The Publication Board ~~shall maintain~~ ~~will establish~~ the template for project submission. ~~This project proposal document designates a project leader and team, and describes the project, its estimated completion date, and final products.~~ Projects led by thesis students will be given special consideration to protect them from competition within the Collaboration. Projects that require joint work with an external collaboration will require a memorandum of understanding set up by the External Collaborators Committee that specifies authorship and publication policies for that work. These should be as compatible as possible with the respective Collaboration policies. Provisional Members and individual external collaborators may be suggested as team members. The External Collaborators Committee must be consulted in the latter case, to determine if MOUs are required.

Work on Collaboration data should apply toward a Collaboration project: failure to submit a project at its initiation, or writing a paper on internal Collaboration data for submission when the data become public, will be considered a violation of the policy. The same general type of analysis on subsequent observing seasons or data releases will be considered separate projects.

Conference proceedings are subject to the same approval and review process as other works to ensure collaboration vetting. However, collaboration members may submit an abstract to the conference to give a talk (with the assent of the Working Group coordinators and subject to approval by the Speakers Bureau) before the required proposal for the written contribution to the conference proceedings is submitted to the Science Council. Approval of the talk does not confer automatic approval of the written contribution.

After discussion, resolution of conflicts, and consensus within the Working Group, the Working Group coordinators will submit the project to the Science Council with a project category recommendation as a Key Project, non-key project, or theory forecast/technical report. At this time the Working Group coordinators will announce the proposal to the Collaboration for a two-week consideration period, for discussion and further resolution of conflicts. Addressing overlap among projects may require revision of the proposed project, and will be negotiated by the Working Group coordinators, publication-project leaders, and Spokespersons. Any Collaboration Members that wish to make defined and useful contributions to the project are welcome to join the team. Disputes will be settled by the Working Group coordinators and Spokespersons as needed.

The Science Council may then approve the project or send it back to the Working Group for further revision. In the event of a tie vote in the Science Council, the project is sent back. When approved, the Publication Board will record the proposal in its project database, including its project category. If there is any substantial change in the scope of a project as it matures, the Project Leader should adjust the project description accordingly, which will result in a new announcement and opportunity for Collaboration review. After the definition of a project, its category can be reclassified only by unanimous written agreement of the project team and a supermajority vote of the Publication Board, or by a supermajority vote of the GB.

Project teams have the responsibility to carry projects to completion and publication. The Publication Board will query the Working Group coordinators twice yearly for progress reports on all projects, and forward the results to the Science Council. **These reports are due by February 1 and August 1.** Any projects without progress for one year will be noted as “inactive” and will be dropped from the database if there is still no progress at the next review.

## 9.4 Authorship

For the purposes of authorship, “Active Members” consist of Senior, Postdoctoral, and Student Members of the Collaboration as defined in §???. Provisional Members and external collaborators may appear as authors on papers when they are part of the project team.

1. For Key Project papers, all Active Members of the Collaboration and all Legacy Members will automatically be placed on the author list. The author list will start with “The CMB-S4 Collaboration” and otherwise be alphabetical, unless the Publication Board agrees that the paper should

be submitted to a journal which requires the first author to be an individual. In that case, the author list will be alphabetical. The Membership Board will provide the current list of eligible Active and Legacy Members to the Publication Board. Anyone who chooses to opt out of authorship for a given Key Project paper must notify the Publication Board. The collaboration will provide a dedicated email address as the point of contact in lieu of a corresponding author. At the end of the paper, the Publication Board may approve an acknowledgment of authors who made exceptional contributions to the paper, based on recommendations from the project team, working group coordinators, and other members of the collaboration.

2. For non-key project papers, the author list will be two-tiered. Project teams may organize the first author tier as appropriate for the paper, and although not required, conventionally the tenured members of the project team will appear in the second, alphabetical tier of authors. The second tier will consist of all active members and legacy members that choose to opt in online after an email notification. The final line of the author list will be “The CMB-S4 Collaboration.”
3. For other forecasts and technical reports, the author list will consist of the project team only, plus any Collaboration members that contributed to the study, as determined by the project team and appropriate Working Group coordinators, unless those authors opt out. The author list should be ordered according to the preference of the project team, followed by “for the CMB-S4 Collaboration.” For conference proceedings, the author list may be the single person who presented.

In rare cases, a Senior Member may recommend authorship for an undergraduate student, graduate student, engineer or technician who is not a Collaboration member. The Senior Member must petition the project team and the appropriate Working Group coordinators with a written description of the critical work done by the suggested author.

Any disputes regarding authorship will be resolved by the Publication Board with the Spokespersons providing tie-breaking votes if necessary. If an eligible member is unable to opt in, due to an unforeseen circumstance, the Publication Board may add them to the author list.

## 9.5 Collaboration Review and Paper Submission Process

The project leader and the project team have the responsibility to draft the publication based on their research. All Collaboration papers will have a title following the template, “CMB-S4: *results of amazing research.*” These papers will be developed in coordination with the relevant Working Groups, and kept in a repository that is visible to the whole Collaboration. Any Collaboration member may comment on the project at any time. All CMB-S4 publications, including proceedings and theses, must include a standard acknowledgment,

agreed to and updated by the Governing Board, and made available by the Publication Board. The Collaboration will pay the page charges for Key Project papers. For all other papers, the page charges are the responsibility of the authors.

When the paper matures to an advanced draft, the Working Group coordinators will request that the Publication Board form an internal review committee. This internal review committee consists of a primary and a secondary reviewer who have the responsibility to ensure that the Collaboration's publications are of uniform and high quality. The reviewers are not current members of the Publication Board, but the Publication Board assigns one of its members to oversee the review of the paper as a rapporteur. At least one of the reviewers or rapporteur should be a senior scientist who can insulate junior participants (whether authors, reviewers, or rapporteurs) from unfair criticism, if it occurs.

The Publication Board will notify the full Collaboration that the internal review committee has formed. Collaboration members may comment on the draft at any time, but when the authors are ready, the Publication Board will send an announcement of a formal three-week comment period. After this comment period, the reviewers will provide a written report on the paper to the authors and Publication Board.

All public comments, from Collaboration members and from reviewers, are to be posted to a centralized location maintained by the Publication Board, along with the authors' responses. All Collaboration members have access to these previously asked questions and responses.

The Working Group coordinators and rapporteur oversee iterations on the draft. When the reviewers, Working Group coordinators, and rapporteur are satisfied that comments have been appropriately addressed, they present the paper to the Publication Board, who gives final permission and sets the date for paper submission. The submission date is announced to the Collaboration with a notice for final reading.

In total, all projects/papers will have four formal public announcements to the Collaboration: (1) when proposed, (2) when the review committee forms, (3) when the formal comment period begins, and (4) when the call goes out for final reading before submission. Projects will also naturally be discussed in plenary teleconference calls, progress reviews, and Working Group reports.

~~All CMB-S4 publications, including proceedings and theses, must include a standard acknowledgment, agreed to and updated by the Governing Board, and made available by the Publication Board. The Collaboration will pay the page charges for Key Project papers. For all other papers, the page charges are the responsibility of the authors.~~

Any disputes regarding the review process will be resolved by the Publication Board with the Spokespersons providing tie-breaking votes if necessary. In the case of a time-sensitive discovery, the review period may be shortened by unanimous consent of the Publication Board.

Graduate thesis and dissertation documents are exempted from Collaboration review, but related publications (e.g. developed from an individual chapter) are subject to review.

## 9.6 Talks and Public Communications

The role of the Speakers Bureau is to help Collaboration members give more and better talks in support of the Collaboration. In addition, the role of the Speakers Bureau is to ensure that talks get distributed among the Collaboration Members in a way that reflects the contributions of different members to the collaboration, their career status and the desire to promote junior members, and equity of opportunities to give talks. The duties of the Speakers Bureau are to:

- **Maintain a list of relevant meetings**, solicit invitations to conferences, and identify good venues for contributed talks.
- Actively solicit speakers for invitations to notable conferences with no volunteer speakers. Priority and consideration should be given to the teams from projects where alphabetical author lists may obscure their roles.
- Promptly respond to requests for speakers from conference organizers and act as a point-of-contact for people who want some CMB-S4 speaker but do not have specific ideas. **The mailing list is the most appropriate way to contact the Speakers Bureau.**
- Serve as a clearinghouse for talk invitations forwarded from any member.
- Curate a library of standard plots and slides for speakers to use in talks.
- Maintain records of all presentation given in the name of the Collaboration and a library of past CMB-S4 talks.
- Address overlap from multiple requests to give talks on the same subject at the same conference, ideally by suggesting focus changes to make them on different topics. Talk prioritization **should reflect ~~will be at~~** the committee's best judgment, **and should consider ~~but should reflect~~** contributions to the topic in question, career status, whether the speaker was invited, and other similar factors.

Any Collaboration Member invited to give a talk with a substantial component focused on CMB-S4, (e.g., on the instrument, projections or science results) at a conference or workshop must forward that request upon receipt and before acceptance to the **Speakers Bureau's mailing list** . The Speakers Bureau will work with the invited Member to determine whether the invited Member should reply to the request with the suggestion that a more appropriate Member be invited to give the talk. In their deliberations, the Speakers Bureau and invited Member should consider the contributions of various members to the collaboration, the desire to promote junior members, and the fair distribution of opportunities to give talks. **The Speakers Bureau should consult with appropriate Working Groups for feedback.**

For approved conference and workshop talks, Collaboration Members must send abstracts and titles to the Speakers Bureau to allow them to be posted at least three days prior to submission, or as soon as possible in the event of last-minute invitations. For these talks, slides must be sent to the Speakers Bureau to allow them to be posted at least one week before being presented and should include “for the CMB-S4 Collaboration” on the title slide.

For talks that will lead to a written contribution to a conference proceedings, the abstract must additionally be approved by the appropriate working group coordinators. As noted in §9.3, the written contribution must be approved separately through the regular publication proposal and review process, but the speaker may submit the conference abstract before completing the required proposal for the written contribution.

For talks not in the above category, such as workshop or conference talks without a substantial component on CMB-S4, or colloquia or seminars, Collaboration Members should also notify the Speakers Bureau of the invitations. This ensures that the Speakers Bureau has a chance to address overlapping talk requests or locate another appropriate speaker in the case of declined invitations. The talks policy applies to all workshops, meetings, colloquia, public lectures, and seminars. The Speakers Bureau need not be informed of talks on other subjects that contain brief advertisements for CMB-S4 (e.g. a few slides with key parameter constraints) or of invited presentations that must remain confidential for programmatic reasons (e.g. certain agency reviews or presentations to private foundations or donors).

All talks must maintain confidentiality of the project’s results. CMB-S4 results not approved for public release by the Science Council cannot be used in a presentation. To request approval for any such material, the speaker must submit the proposed slides to the Speakers Bureau at least one week in advance. Such results must be marked “CMB-S4 PRELIMINARY” on each slide. Results from any slide that has received Science Council approval can be re-used for other presentations without the need to have them re-approved.

## 9.7 Violations of the Policy and Remedies

Violations of the policy will be addressed by the Publication Board, which will forward violations and recommend a remedy to the Executive Team. Minor infractions will receive a warning, while repeated or severe infractions may warrant suspension from project teams or Working Group activities, removal from such groups, or expulsion from the Collaboration as determined by the Governing Board.

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# CURRENT TEXT FEB 2020 (Bylaws v1.3)

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Project Leader should adjust the project description accordingly, which will result in a new announcement and opportunity for Collaboration review. After the definition of a project, its category can be reclassified only by unanimous written agreement of the project team and a supermajority vote of the Publication Board, or by a supermajority vote of the GB.

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This internal review committee consists of a primary and a secondary reviewer who have the responsibility to ensure that the Collaboration’s publications are of uniform and high quality. The reviewers are not current members of the Publication Board, but the Publication Board assigns one of its members to oversee the review of the paper as a rapporteur. At least one of the reviewers or rapporteur should be a senior scientist who can insulate junior participants (whether authors, reviewers, or rapporteurs) from unfair criticism, if it occurs.

The Publication Board will notify the full Collaboration that the internal review committee has formed. Collaboration members may comment on the draft at any time, but when the authors are ready, the Publication Board will send an announcement of a formal three-week comment period. After this comment period, the reviewers will provide a written report on the paper to the authors and Publication Board.

All public comments, from Collaboration members and from reviewers, are to be posted to a centralized location maintained by the Publication Board, along with the authors’ responses. All Collaboration members have access to these previously asked questions and responses.

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