

LISA Consortium Membership Quick Guide

v1.4 updated April 17, 2025

Contents

1. Introduction	2
2. Individual sign-up	3
2.1 Sign-up form	3
2.2 Sign-up review and completion	8
3. Service tracking pledge	10
3.1 Pledge form	10
3.2 Pledge review	13
4. Creating a member group	14
5. Joining a member group (or a WG at any time)	17
6. Service tracking statement	18
6.1 Statement form	18
6.2 Statement review	21
7. Projects	22
8. Frequently Asked Questions	25



1. Introduction

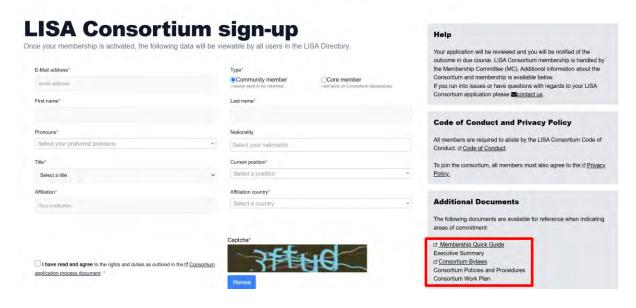
In this manual, we describe the process for joining the LISA Consortium and maintaining their membership and service tracking currency. Special instructions valid only for members of the old Consortium and to be applied during the **TRANSITION** period will be marked as such. (They will be removed after transition is completed.)

Before applying, all prospective members must read the present document, the Bylaws document, the Policies and Procedures document, the Work Plan document, the Code of Conduct and the Privacy Policy that can be found in the right grey tab in the sign-up page.

TRANSITION: We are receiving a high volume of applications. To ensure a seamless process for all users, <u>please</u> read this Quick Guide before signing up and submitting your pledge. Please also be patient about your application: we are only 5 people and cannot process all incoming requests within 24 hours.









2. Individual sign-up

2.1 Sign-up form

The user signs up for the LISA Consortium as an individual member in the sign-up page. They can choose between Community membership and Core membership:

LISA Consortium sign-up

Once your membership is activated, the following data will be viewable by all users in the LISA Directory. E-Mail address Community member O Core member email address First name Last name

TRANSITION: All former members of the Consortium must sign up anew if they want to continue their membership. Please make sure to:

- Indicate the same email as in your old profile (you can change it at a later stage).
- Select the correct type of membership before submitting the form.

If you made a mistake and signed up as a Community member instead of Core member, DO NOT send another application. Instead, you should contact the MC (membership@lisamission.org) as soon as possible. Once again:

IMPORTANT

→→→ USE THE SAME EMAIL AS IN YOUR OLD CONSORTIUM PROFILE (YOU CAN CHANGE IT AFTER YOUR SIGN-UP IS APPROVED).

→→→ IF YOU MADE A MISTAKE IN THE SIGN-UP FORM, DO NOT SUBMIT ANOTHER ONE!

The sign-up form is made of two parts. The first part collects a series of fields whose answers will appear in the member's page in the LISA Consortium Directory. All but one field are mandatory:

- E-Mail address.
- Type of membership (Community or Core).
- First and last name.



- Pronouns (has an "I prefer not to answer" option; will be used also for statistical purposes).
- Nationality (optional; will be used also for statistical purposes).
- Title.
- Current position.
- Affiliation
- Affiliation country.

If you choose Community membership, then an extra **optional** field appears where you can subscribe to one or more mailing lists dedicated to each WG:

Mailing list	WG *
Community-Astrophysics	Astrophysics
Community-Cosmology	Cosmology
Community-Waveform	Waveform
Community-Fundamental-Physics	Fundamental Physics
Community-ISP	Instrument Simulation and
·	Processing
Community-Instrumentation	Instrumentation
Community-Data-Analysis-RD	Data Analysis Research and
-	Development
Community-ECS	Early Career Scientists

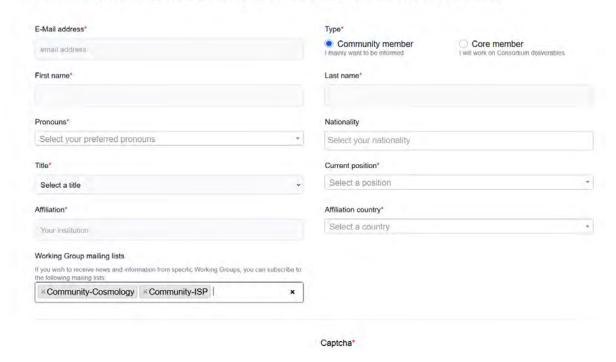
* IMPORTANT

 $\rightarrow \rightarrow \rightarrow$ SUBSCRIPTION TO THESE MAILING LISTS DOES <u>NOT</u> AMOUNT TO JOINING ANY OF THE WGS.



LISA Consortium sign-up

Once your membership is activated, the following data will be viewable by all users in the LISA Directory.

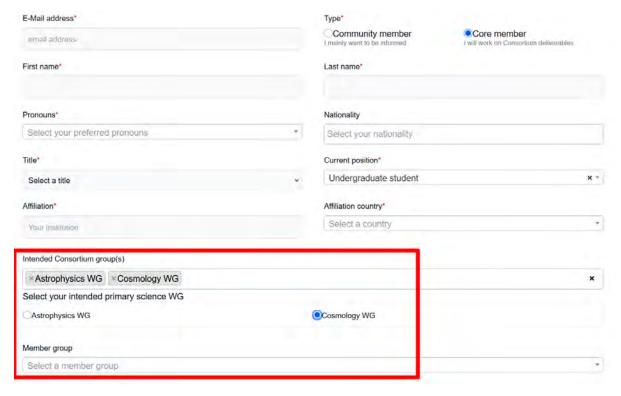


For Core membership, the following fields also appear:

- Intended Consortium group(s). The user can indicate as many Working Groups (WG) as desired; then they are prompted to select a primary science WG, for the purpose of Council representation. The "Support Team" option is only for staff not involved in the scientific, technical or technological output of the Consortium and cannot be selected together with any science WG.
- Member group. Select which member group you wish to join. For convenience, groups in the user's affiliation country are listed first, followed by all the others. The user can choose not to join any member group (select "I do not wish to join any member group at this time").

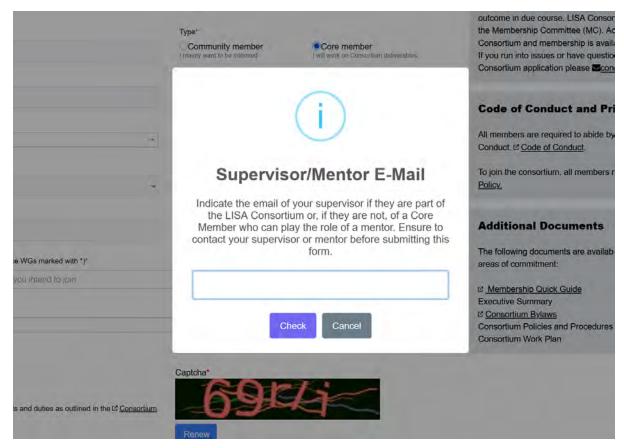
TRANSITION: Since member groups are formed at a later stage during transition, currently only very few member groups and the option "I do not wish to join any member group at this time" are available.





If the applicant for Core membership is a **student**, they are prompted to indicate their supervisor e-mail. Supervisors should sign-up as Core members before their students and the e-mail indicated by the student should be the same the supervisor used for sign-up. If the supervisor is not in (and does not intend to join) the Consortium, then the applicant can indicate the email of a Core member who can take the role of a mentor. The student should contact their supervisor or, in their stead, the mentor *before* applying for membership.





Supervisors or mentors are informed automatically about their student's sign-up. They can check any pending application here.

The second part of the sign-up form is made of four optional demographic questions whose answers are stored for statistical purposes in a database accessible by the Diversity Equity Inclusion committee and the Directory administrators. These answers do not appear in the member's personal page. Statistical summaries may be prepared from these data and shared with the Consortium.

Remember to click the **Send Application** button at the end of the page.



Demographic Questions

Answers to the following questions will not be publicly viewable in the Consortium Directory. They will be accessible to members of the Consortium DEI Committee (diversity@lisamission.org) only for the purpose of understanding and consulting on the diversity status of Consortium groups, and to the Consortium leadership and technical developers of the Directory only for practical necessity. Respondents will have the opportunity to update these responses at a future point.

Woman Man Transwoman Transman Nonbinary Not listed I prefer not to answer
Transwoman Transman Nonbinary Not listed
Transman Nonbinary Not listed
Nonbinary Not listed
Not listed
Ol prefer not to answer
Do you work in the country of your birth?
Yes
No
I prefer not to answer

2.2 Sign-up review and completion

All individual applications are reviewed by the Membership Committee (MC; former Membership Management Team). The outcome of the application is communicated to the user via the e-mail indicated at sign-up.

When the application is approved, a personal page is created in the <u>Directory</u>, the user is **automatically added to the WGs they indicated** and is prompted via e-mail to log in for the first time to accept the Terms of Service and set their password. These actions are mandatory to complete one's membership and should be taken within **two weeks** from the e-mail alert. A reminder one week and one day before the deadline will be sent.

If the user does not accept the Terms of Service and set their password within two weeks, their personal page is removed and the user is encouraged to reapply for Consortium membership.

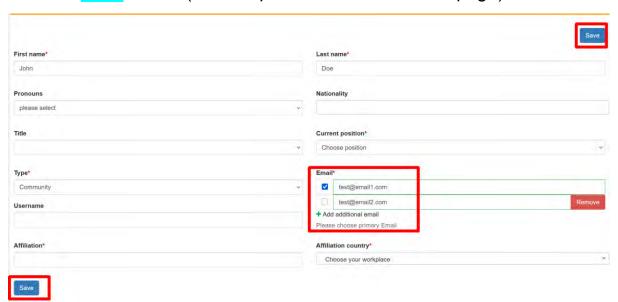


When the user accepts the Terms of Service and sets their password, if they signed up for Community membership then the process is completed and they officially become a LISA Consortium Community member.

If the user signed up for Core membership, then the process is *not* completed until they submit their pledge and the latter is approved (see section 3). The time stamp for Core membership, which determines when the member is due to submit their service tracking statement, is given at the moment their pledge has been approved. **Only at this point do you officially become a LISA Consortium Core member**.

TRANSITION: Members of the old Consortium who accepted the Terms of Service already have access to the Directory and do not have to complete the two steps of password reset and acceptance of the Terms of Service, despite what the e-mail will say. However, they do have to submit their pledge as indicated (except Legacy members).

At any time, members can modify their personal data in their page. They can also indicate multiple e-mails and whether they want Consortium communications sent only to the primary e-mail or to all. Remember to click the Save button (at the top and the bottom of the page).



TRANSITION: The fields in the personal page are organized differently than before. Members of the old Consortium will have to rearrange or refill some of the fields by hand, for example the first and family names (which will appear as one entry in the "First name" field). Please check all your data carefully upon your first log-in.



3. Service tracking pledge

Before the start of their membership, all new (also called probationary) Core members except Legacy members must submit a **pledge** describing their intended Consortium activities for the first year. A pledge must also be submitted every year by Core members after their latest statement is approved.

IMPORTANT

→→→ DO NOT CONFUSE THE **PLEDGE** (ACTIVITIES OF THE NEXT YEAR) WITH THE **STATEMENT** (ACTIVITIES OF PAST YEAR)!

TRANSITION: Members of the old Consortium are treated as new members. Therefore, during transition <u>only the pledge must be submitted</u>. If you made a mistake and submitted a statement instead of a pledge, your statement will be rejected and you will be invited to send us a pledge.

3.1 Pledge form

The user who applied as a Core member can submit their pledge via the *Pledge* option in left tab in the Directory:





It leads to a list of past (non-editable) pledges together with a **Create**PLEDGE button:



In the pledge, the user must indicate

 A drop-down menu with all current Consortium or SGS projects one intends to contribute. The user can leave this field blank if they are not sure about which project(s) they could meaningfully participate in.

TRANSITION: A tickbox "I am not sure which projects I will contribute to" may already be in place when you sign up.

New Core members can join the Consortium without jointing existing Consortium projects. Such members are provisional and have one year to join a Consortium project or provide other defined deliverables, as stipulated in the bylaws.

TRANSITION: As many projects are not yet in the database, we will not distinguish provisional from regular Core members in the first year. Also, if you do not see your expected project in the database, please describe the contribution in the text box.

<u>Important</u>: The pledge is only a declaration of which projects (among other activities) the member wants to contribute during the coming year. Selecting a project in the pledge does <u>not</u> automatically add the user to the project. As explained in section 7, the only way to join a project is to contact the WG chairs or the project coordinator(s) and ask them to be added manually.

- An optional drop-down menu with options to indicate membership in the LISA Science Team (LST), in a Science Topical Panel (STP), participation in other ESA activities or in NASA Science Ground Segment (SGS) activities.
- A free-text box with mandatory short but **substantial** description of the intended activity, including about Consortium science projects and SGS (in particular, DDPC) activities.





The pledge is not submitted until the user clicks the Submit button, after which no further changes are possible.

TRANSITION: The current structure of the pledge form is temporary and will be updated soon. Also, only Consortium projects are currently available but the database will be extended to DDPC and other SGS projects, NSGS and P&O. For now, these contributions should be listed in the free-form text box.

The first pledge must be submitted no later than **two weeks** after sign-up. All subsequent annual pledges follow the same schedule of reminders as the service tracking statement (see section 6), counting from approval of the last statement. If a Core member fails to submit their second or following pledge no later than **one month** after the due date, then their membership is automatically reclassified as Community and they are encouraged to reapply for Core membership at any time, contacting the MC.



3.2 Pledge review

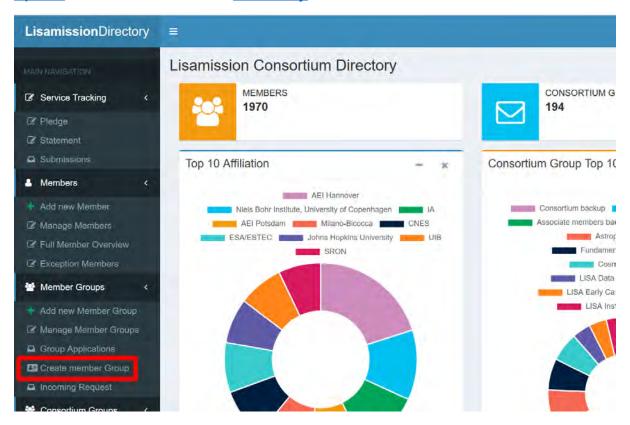
The pledge form is reviewed by the MC, which can reject the application, approve it or send it back to the user for further editing, for instance, if the description in the free-text field was not detailed enough. Upon approval of the first pledge, a time stamp is created and the user **officially becomes a LISA Consortium Core member**. Upon approval of subsequent pledges, Core membership of the user is extended one year.

When rejecting an application, the MC informs the user and gives an explanation. The decision can be appealed according to the procedure established in the <u>Policies and Procedures</u> document.



4. Creating a member group

Once the prospective leader has become a core member of the LISA Consortium (i.e., after their pledge has been approved), they can submit an application to create a member group via the <u>Create member group</u> option in the left tab in the <u>Directory</u>:

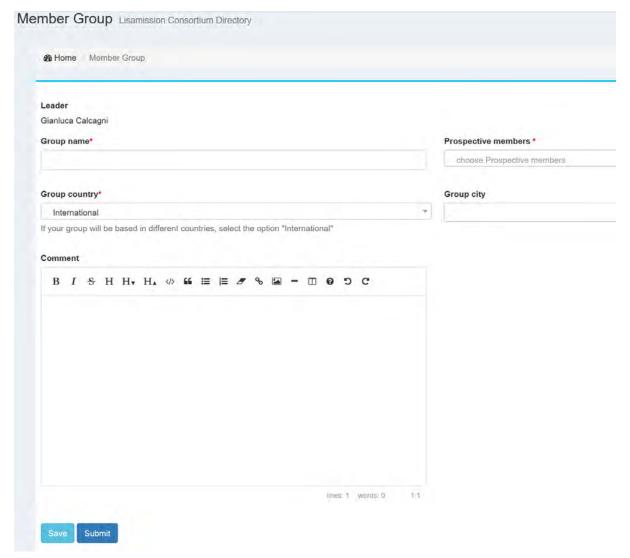


In the form, they must indicate:

- Name of the group.
- Number of prospective members (a minimum of 5 Core members is required; Community members cannot join member groups).
 Important: groups of 20 or fewer can form as they wish but groups with 21+ members must be at a single institution or have a scientific reason for forming if multi-institutional.
- The country where the group will be based (in the case of a multicountry group, select the option "International").
- The city where the group will be based (**optional**, if the group spans different cities or countries).
- A free-text box (optional).

The application can be saved but it is not submitted until one clicks the **Submit** button.





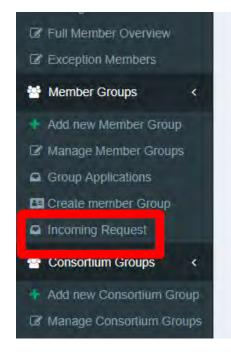
Once the application is submitted, it is reviewed by the MC in adherence with the Consortium Bylaws and Policies and Procedures. Upon approval, the group page is created and the link is sent to the group leader. The group immediately appears in the *Member group* tab in the <u>sign-up page</u>. The leader is automatically included as such in the group.

The leader should inform their prospective group members, which must act within **two weeks**. Reminders will not be sent automatically and it is the group leader's responsibility to ensure that prospective members join. The joining procedure is detailed in section 5.

The group leader can accept new members either through the link provided by email alerts when someone wants to join from the <u>Directory</u> or from the left tab <u>Incoming Request</u>:









If, after two weeks, a minimum of 5 Core members (including the leader) have joined the group, then the group becomes a stable entry of the <u>Directory</u> and no further action is need.

If, after two weeks, fewer than 5 Core members (including the leader) have joined the group, then **the group is automatically disbanded** and the leader is encouraged to reapply at any time.

A Core member can be leader of only one member group at the time. The *Create member group* option is disabled until the member relinquishes their group leadership.

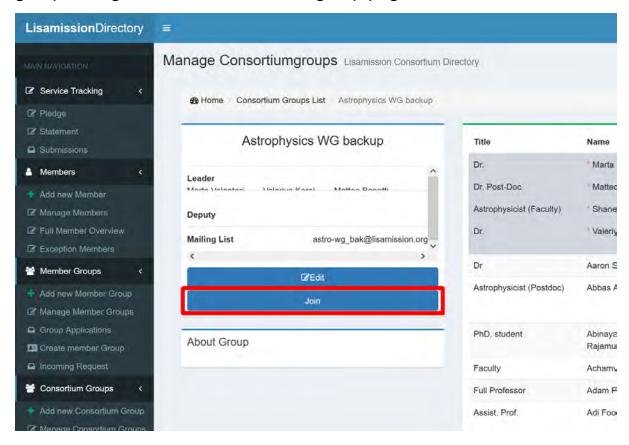
TRANSITION: Leaders of external groups of the old Consortium must apply to form their group ex novo, if they decide to continue it. Old external groups must not be used but will stay in the Directory until all their members have been relocated in the new Consortium or until a date to be determined by the Council, after which the group will be removed as part of the general clean-up of the Directory.



5. Joining a member group (or a WG at any time)

Core members can join one (and only one) member group at the time.

If the user is already a Consortium Core member, then they can join the group through the *Join* button in the group page:



If the user is a Community member, then they must first upgrade their membership to Core type contacting the MC and submitting their pledge.

If the user is not yet a Consortium Core member, then they must first sign up via the <u>sign-up page</u> and indicate the member group therein.

The group leader is notified of the application and, if approved, group membership is granted with just one click.

Upon sign-up, Core members are automatically added to the WGs they indicated in the sign-up form but they can apply to join any other WGs at any time with the same method described in this section. Applications are subject to approval by WG chairs.



6. Service tracking statement

TRANSITION: This feature is already enabled but will not be needed until about 11 months have passed since the beginning of your Core membership. The following instructions may have changed substantially by then. You will be informed in due time about the most updated service tracking procedures.

All Core members except Legacy members must submit a statement of their Consortium activities every natural year. They will be prompted to do so via automatic e-mails one month before, two weeks before, on the day of, two weeks after, and one month after the deadline. The deadline is set to be one year from the previous time stamp (inception of Core membership or approval of last statement).

IMPORTANT

→→→ DO NOT CONFUSE THE **PLEDGE** (ACTIVITIES OF THE NEXT YEAR) WITH THE **STATEMENT** (ACTIVITIES OF PAST YEAR)!

6.1 Statement form

Core members can submit their statement via the <u>Statement option</u> in left tab in the <u>Directory</u>:





It leads to a list of past (non-editable) statements together with the button Create STATEMENT:

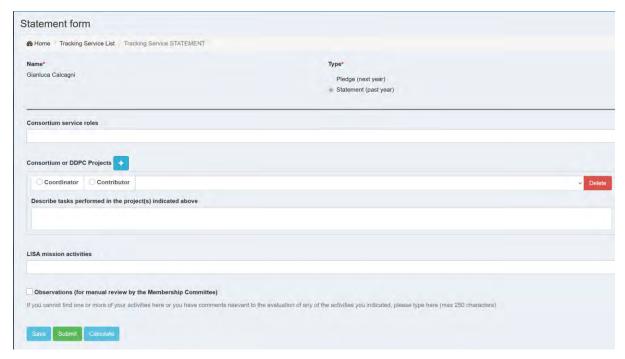


In the statement, the member must indicate the following:

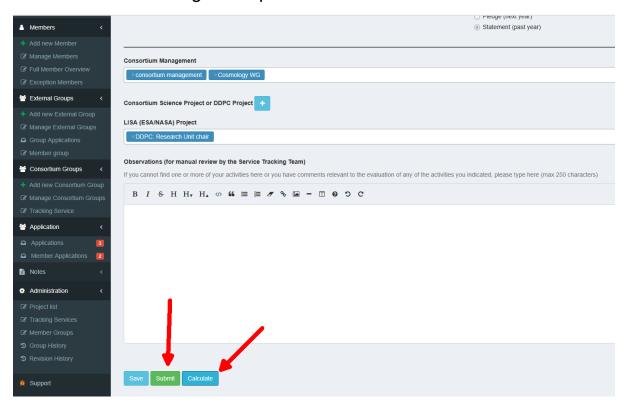
- Participation in Consortium service roles, i.e., chairmanship of one the Consortium WGs and membership or chairmanship of one of the committees or governance entities. Multiple choices from a dropdown menu are possible.
- Participation in Consortium or SGS projects: a dropdown list of current projects is available and multiple choices are possible. For each project, the member must provide a brief description of their activities and tasks.
- Participation in LISA mission activities carried out outside the Consortium but that count as Consortium deliverables, such as membership in the LST, membership in an STP, chairmanship in a DDPC Coordination Unit (CU), participation in other ESA or NASA SGS activities, and so on.
- A free-text box is available for exceptional circumstances, for instance, in the case the member cannot find one or more of their activities listed or if one or more of the listed activities require additional important information to qualify for ownership.

Important: The statement form is synchronized with the information in Directory and, if such information is incomplete or outdated, then the user may not find all their activities reflected in the form.





With the button Calculate, you can make an estimate of how many "points" you will accrue if all the activities you indicate will be validated. Note that the statement is not submitted until you click the Submit button, after which no further changes are possible.



If a Core member fails to submit their service tracking statement no later than one month after the due date, then their membership is automatically



reclassified as Community and they are encouraged to reapply for Core membership at any time, contacting the MC.

6.2 Statement review

After submission, the service tracking statement undergoes several automatic cross-checks. WG chairs review the statements of project coordinators; project coordinators review statements of project contributors; the MC performs a final cross-check of the information. When the statement is approved, the member's contribution is automatically updated in their personal page.

If the contribution is rejected (e.g., because the member did not contribute enough to the project as per project internal guidelines), an explanation should be given. The MC then reviews the coordinator's response and contacts the member before processing their statement further.

If the member did contribute to the project but does not appear in the list of contributors in the project database (see section 7), then the coordinator must first modify the database entry manually (section 7) and then click Approve in the form.

After approval by the project coordinator, this step of the statement is automatically validated.

If the member filled the free-text box, or if they were previously flagged in the course of the year, the statement is manually reviewed by the MC.

The final decision by the MC can be appealed according to the procedure established in the <u>Policies and Procedures</u> document.

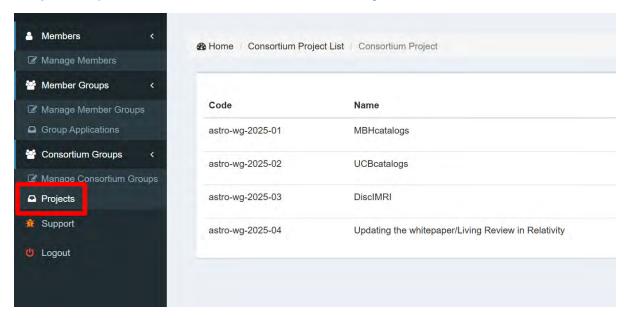


7. Projects

The Consortium and the DDPC share a database (<u>Projects (view only)</u> tab) where short-term scientific or technological projects are listed and viewable by all Directory users. These projects have a typical duration ranging from a few weeks to 1-2 years and they count as deliverables for service tracking. Therefore, it is important to keep this database as accurate and updated as possible.

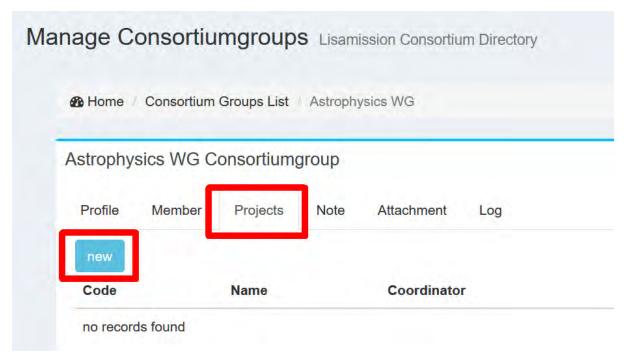
TRANSITION: This database will soon be extended to projects of other sectors of the LISA mission SGS.

Community and Core members can browse the database from the <u>Projects option</u> in the left tab of the <u>Directory</u>:

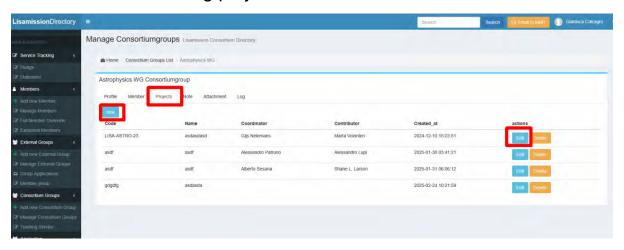


Science or technology projects can be created only by the chairs of science WGs or the DDPC only from the WG or DDPC page (not the Projects (view only) tab), button Edit, tab *Projects*, button New:





In the same tab, existing projects can also be viewed and edited:



The WG/DDPC chairs can indicate one or more project coordinators. Once included, also coordinators can edit the entry and add contributors. Each entry contains the following basic information:

- Title (mandatory). This can coincide with the project code if the project is deemed sensitive for the mission (e.g., a Key Project).
- Code (mandatory), an alphanumeric unique identifier of the project with the non-editable automatic structure WG/CU-ACRONYM YEAR NUMBER (e.g., CosWG-2025-001).



- Description (optional). This field can be left empty, for instance, if the project is deemed sensitive for the mission.
- A list of coordinators and contributors that the WG chairs or project coordinator(s) can populate from the Directory database.



Except the project code, all the information can be updated by chairs and coordinators at any time, until the button Finalize (available only for WG chairs) is pressed when the project is finished (e.g., when the paper is published).

Core members wanting to **join a project** should contact the coordinator(s) through the e-mail(s) indicated in the project entry.



8. Frequently Asked Questions

Sign-up

Q: I am a member of the new Consortium. Is my membership automatically transferred to the new Consortium?

A: No. All past members must reapply anew.

Q: I have signed up. Am I a Consortium member now?

A: No. Your application must be approved by the MC. Upon approval, if you applied as a Community member or if you are a Legacy member, then you have become a member officially.

Q: I made a mistake and signed up as Community member instead of Core. What should I do?

A: Please contact the MC and we will fix your application.

Pledges and statements

Q: I come from the old Consortium. Should I submit a statement as well as a pledge?

A: No. All past members are considered as new members and they can only submit a pledge (activities planned for the coming year).

Q: I made a mistake and submitted a statement instead of a pledge. What should I do?

A: The MC will reject your statement and invite you to submit a pledge.

Q: I made a lot of contributions for the old Consortium. If I am not supposed to submit a statement, then how will my past work be acknowledged?



A: Members who gave exceptional contributions can be nominated for Legacy membership as described in the <u>Bylaws</u> document, section 3.7. The Council deliberates on such nominations.

Projects

Q: I cannot create or edit projects.

A: Only WG/DDPC chairs can create projects and only WG/DDPC chairs and projects coordinators can edit projects. The only way to edit a project is from the Projects tab in the WG/DDPC page.

Q: I am a chair or a coordinator but still I cannot create or edit projects.

A: You must first sign up, have your application approved, then submit your pledge, then your pledge approved. If you still cannot create or edit projects, send an email to membership@lisamission.org.

Q: How can I join a project?

A: You must contact the project coordinator(s). Their email is in the project entry in the database.

Q: I have indicated one or more projects in the sign-up form? Have I joined them?

A: No. You must contact the project coordinator(s), who will decide about your application.