Strategic Considerations for Rethinking AIP's Affiliated Societies Program

I. Executive Summary

AIP is in the midst of a strategic planning process that will guide its actions over the next five years. As part of this process, a white paper team was formed and tasked with exploring the question: “How can we evolve or even restructure the Affiliated Society class to grow the value of the relationship and advance AIP’s Strategic Framework?”

A few themes emerged from the team’s discussions:

• Broadly speaking, the team felt that a program that treats affiliates primarily as partners rather than clients would best advance AIP’s Strategic Framework. While fee-for-service products could, and likely will, continue to be a part of the Affiliates program, they should not be the primary purpose of the affiliation.

• Having a point person at AIP who is designated to nurture relationships with the Affiliates would help grow the feeling of partnership. Encouraging multiple points of contact and engagement on shared projects would also have this effect. AIP is not served by having passive in-name-only Affiliates. Investing in more active partnerships will pave the way for future mutually beneficial collaborations.

• Expanding the scope of the Affiliates program to include more societies that are not focused primarily on a physical sciences discipline could help AIP bring in voices with complementary experience and expertise that can advance AIP’s and the Member Societies’ goals.

This report does not recommend a specific path forward; rather, it presents and analyzes a diverse set of elements that might be part of future partnerships. The report is divided into six main sections:

• **Background and motivation**: We describe the current state of the program, the motivation for re-examining it, and the prior work done on this topic.

• **Roles for affiliates in the AIP federation**: We examine how Affiliates could help AIP advance its goals through the lens of four potential roles: audience, customers, experts, and partners.

• **Tools to build and maintain meaningful relationships**: We present elements that could serve to strengthen Affiliates’ relationships with AIP.

• **Tools to maintain an agile, adaptable Affiliated Society program**: We present elements that could ensure the Affiliates program is dynamic and able to change with the times.

• **Potential obstacles**: We present challenges AIP may face if it seeks to revamp the Affiliate program.

• **Next steps: Action items**: We suggest initial steps AIP could take on the journey toward redefined or renewed affiliate relationships.
II. Background and motivation

Current status

AIP is a federation of 10 Member Societies (MS) that works to advance, promote, and serve the physical sciences community. The MS pay dues based on their membership numbers and receive a defined set of benefits as well as the right to vote as part of AIP’s governance (see Appendix 1). In addition to its voting and dues-paying MS, AIP also has 27 Affiliated Societies (AS) who do not pay dues, do not vote, and receive a limited set of benefits (see Appendix 2).

The benefits provided by AIP to AS are mostly static. Prior to 2011, many AS’s primary interaction with AIP was through AIP’s fee-for-service publishing services. After AIP changed its publishing business model in 2011, AIP had reduced interactions with its AS.

The benefits that the AS receive are also primarily passive; although AIP makes services available to AS, the AS or their members must take the initiative to use the benefits. Other than the AS leadership being invited to AIP’s Assembly of Society Officers and being sent AIP’s Annual Report, there is no regular contact between AIP and the AS.

In its current state, the AS program produces limited engagement between AIP and the AS. Below is a summary of current benefit usage by the AS:

- Of the 27 AS, 17 have sent a representative to AIP’s Assembly of Society Officers at least once in the past four years; only 12 have attended more than once during that time.
- Members from 5 of the 27 AS purchase APSIT group insurance.
- No AS has requested or used the Statistical Research Center’s services; it’s unclear if they’re aware of the benefit.
- Only one AS has ever used AIP’s Government Relations services; it’s unclear if they’re aware of the benefit.
- In 2019, 19 Affiliated Society members subscribed to an AIP journal at the discounted rate.
- None of the AS currently partners with AIP Career Network or has in the recent past.
- None of the AS currently uses media services. In the past 5 years, only the Biophysical Society has used them.

A few of the AS have actively engaged with AIP in other ways. Many years ago, AIP Career Network used to manage the Materials Research Society job fairs. More recently, the Biophysical Society and Materials Research Society underwrote Inside Science. The National Society of Black Physicists worked with AIP on TEAM-UP; they also partner with SPS and participate on the Liaison Committee on Underrepresented Minorities. The Physical Society of Taiwan negotiated access to Physics Today content for their members at a discounted rate. AIP houses the American Geophysical Union’s archives. AGU used to be a Member Society, and the archive was acquired one year before AGU left. At one point, SPIE took active steps toward becoming a MS. In some cases, AS use an AIP service for a time and then stop, such as the Biophysical Society’s use of AIP’s media services. Those changes could be due to changing AS staff or AS priorities, but there is no standard mechanism to connect with the AS to understand why they’ve stopped using a benefit or see if they would be interested in resuming use in the future.
AIP has trade agreements with SPIE, MRS, SVC, and the Microscopy Society of America. The trades are mutually beneficial and involve, for example, *Physics Today* receiving elevated exposure and distribution at a society meeting in exchange for advertisement in *Physics Today*. This is not a benefit of the AS program; MS and other societies not connected with AIP can also have such agreements.

AIP Publishing has partnerships with five MS and one AS—the Laser Institute of America—in addition to other societies not connected with AIP. They also offer event and exhibit management services. Although AIP might consider partnering more closely with AIPP in a reworked AS program, partnerships with and benefits from AIPP are beyond the scope of this paper.

Some of the AS have no meaningful relationship with AIP. Although their passive presence increases the size of AIP as a federation, it doesn’t make the federation more vibrant, productive, or collaborative. However, without any active mechanism for renewing AS status, and without any cost to remaining an AS, many societies may remain affiliated even if they no longer see any strong value in the relationship. For example, some AS were primarily affiliated with AIP for the publishing services, and they remain affiliates even though publishing benefits have not been part of the AS program since 2011.

When asked, AIP staff reported little to no engagement with the AS by themselves and their departments. Some reported experiencing a “culture of inhibition” in which they feel discouraged from interacting with AS because of the ambiguous nature of the relationship. However, staff from various departments reported interest in growing relationships with the AS and proposed ideas for joint ventures that could be pursued if that relationship existed.

**Motivation and Prior Work**

In September 2019, AIP’s Board of Directors adopted a new strategic framework that lays out the Institute’s goals for growth and evolution over the next five years (see Appendix 3). One of the tools AIP could use to meet those goals is its AS program.

AIP has considered its options regarding the Affiliates program in the past. The bylaws restrict voting rights to the existing MS class, but leaves it to the Board’s discretion to define relationships between AIP and nonvoting classes of members (see Appendix 4). In November 2016, the AIP Board Membership Committee and AIP’s management presented a proposal for a three-tiered membership structure (see Supplementary Document 1). The proposal maintained the existing Affiliate and Member classes and added an intermediate Associate Member class, which entailed reduced dues relative to full Members in exchange for a limited set of benefits that went beyond those offered to Affiliates. At the time, the Board tabled that proposal.

In August 2019, the Membership Committee presented a report to the AIP Board of Directors laying out the strategic considerations surrounding the three options for the program’s future: suspension, maintenance, or restructuring (see Supplementary Document 2). The report contained SOAR(R) analyses for the three options.
Rather than considering all three options presented in the 2019 report, this white paper focuses on restructuring AIP’s Affiliates program. It builds upon the SOAR(R) analysis presented in that report to provide the Board with a wealth of ideas for what a future Affiliates program could entail and outlines the process that could go into choosing a particular path forward. Our discussions were informed, but not limited, by AIP’s previous efforts.

III. Roles for Affiliates in the AIP federation

In a series of large and small group meetings, the white paper team brainstormed ways in which affiliates could help AIP achieve its strategic goals and what AIP could offer affiliates in return. We found that our ideas fell into four main categories: affiliates as an audience; affiliates as customers; affiliates as experts; and affiliates as partners in shared endeavors. Affiliates could serve multiple roles at once. For some affiliates, increasing levels of engagement could lead to them eventually becoming member societies. Other affiliates could serve one role for a limited amount of time.

Affiliates as an audience

AS and their members are a potential audience for AIP’s products, services, and events. Through their awareness and participation, they can spread the word and thereby naturally increase AIP’s reputation and reach. That has the potential to draw increased attention and additional investment (philanthropic or otherwise).

(a) Readers for Physics Today and FYI
(b) Readers for AIP reports such as TEAM-UP
(c) Audiences for AIP lectures, events, and conferences
(d) Viewers for webcasts and online trainings
(e) Listeners for podcasts
(f) Users of the Niels Bohr Library and the Center for the History of Physics

How does this help AIP meet its strategic goals (SGs)?
(a) AS could help AIP distribute products intended for narrow audiences in a more targeted manner, such as communications aimed at specific sectors or identity groups. They could also increase attention to products intended for a broad audience. (SG 3)
(b) AS members who are actively reading AIP products or attending AIP events and programs will raise awareness of and respect for AIP’s brand and its cornerstone programs. (SG 3)

Affiliates as customers

The primary role laid out for AS in the current program is as customers for AIP’s services. The AS may receive the services for free or they may pay to use those services, sometimes at a discounted rate. AIP could expand its free or fee-for-service offerings.

(a) AIP could create a “Federation Office” at ACP that AS officers could use and work out of when they’re in the DC area. This could be provided for free or, like at coworking spaces, as a fee- or subscription-based service.
(b) AIP could allow AS to buy into AIP’s health insurance, which would allow smaller organizations to benefit from the pricing of a larger plan. It would not diminish the MS benefits, and may even be something the MS would also want to participate in. This benefit would likely be of interest to smaller AS.

c) AIP could house archives for other AS in addition to AGU. To avoid overwhelming our facilities, they could get a limited amount of storage for free, and more for a fee. This could increase the library’s resources and help the AS preserve their history.

d) Affiliates’ members could receive discounted PT. Assuming a base of 100k subscribers, adding an extra person costs $7. The discounted price could be less than the face-value price of $25 but still more than the additional cost to AIP.

e) AIP staff can provide trainings to AS staff and/or members.

(f) Some affiliates could be part of a new dues-paying but still non-voting class. This could be seen as a natural pathway to membership.

How does this help AIP meet its strategic goals?

(a) Increased revenue from fee-based services or dues could better enable AIP to serve its MS and to pursue its research, analysis, preservation, and outreach goals. (SG1, SG2, SG3)

(b) In isolation, this type of benefit may negatively affect AIP’s ability to meet its strategic goals. Without a deeper relationship, fee-based services can make the partnership feel transactional rather than collaborative. This could result in lost opportunities to connect, which could result in lost revenue through other streams and missed collaborations. (SG2, SG3)

Affiliates as experts

AS and their members could be invaluable resources for AIP in its thought leadership endeavors as well as in serving its MS.

(a) AS could partner with the SRC on survey projects aimed at discovering and reporting trends in the physical sciences. They may be able to provide data about a wider range of physical scientists, including the ever-elusive industrial physicists, by helping the SRC access their membership.

(b) AS that are international, career-focused, or identity-based could provide unique perspectives and knowledge from their members in those key areas. The societies may have focuses and goals that are distinct from the MS, which would open new opportunities for AIP to expand without much risk of overlap with the MS goals or membership. They could contribute to AIP’s knowledge about a range of topics:

- social issues
- international competition and collaboration
- intellectual property
- national security
- climate change
- government regulation
- the workforce pipeline
These issues are also important to physical scientists outside of academia and may help AIP provide more value to those parts of its constituency.

(c) AS members could serve as experts to interview for articles or consult in the development of story ideas.

(d) AS and their members could provide viewpoints of scientists in sectors not currently well-represented by the current MS, such as private sector physicists.

(e) AS and their members could speak to the experiences of people with underrepresented identities in the physical sciences.

(f) AS could represent the broader scientific community. Although our goals and issues aren’t always aligned, they often are. For areas in which other parts of the scientific community have made more progress than the physical sciences, such as gender parity, partnership would provide an opportunity for AIP to learn best practices and bring that knowledge and expertise back to its stakeholders.

(g) Affiliates could contribute to a database of experts that AIP, its MS, and other affiliates can tap into to find collaborators or outside expertise.

(h) AS could represent professional groups and organizations focused on, for example, college; higher education; association management; particular identities or affinities; science/STEM more broadly; science writing and communication; individual sectors or places of work; or broader societal goal such as workplace diversity and gender parity.

(i) Experts from AS may help shape best practice recommendations, policy statements, and reports from AIP through their unique and diverse perspectives.

(j) Groups whose missions overlap with AIP’s but are not professional scientific societies, such as teachers’ unions, artist groups, government employee groups, museums, libraries, and student groups could help AIP engage with the broader public.

How does this help AIP meet its strategic goals?

(a) By increasing engagement and diversity in the AS program, AIP as a federation can include more voices in AIP-convened forums and discussions of topics of shared interest. (SG1)

(b) AIP can increase its expertise, or its access to expertise, in areas such as public policy, career development, and education by engaging with a more diverse set of AS. That also provides an opportunity to bring the voices of physical scientists in a wide range of non-academic careers into discussions. (SG2)

Affiliates as partners in shared endeavors

AS and their members could partner with AIP or the MS on programs of common interest that would benefit all parties involved.

(a) AS could participate in programs that AIP runs, such as the oral histories program.

(b) AIP could play a supporting role in a project led by an AS. When AS have more experience and expertise in a particular area, it makes sense for AIP to assist rather than lead.

(c) AS can help AIP achieve big-picture goals such as:
   • Ensuring funding for science/the physical sciences
   • Increasing diversity across the physical sciences (in academia, government, and the private sector), particularly in leadership roles
• Making good science education available to all citizens
• Making science “cool” and relevant to students and the public
• Connecting physical science students with jobs or skill-specific training
• Injecting science into discussions in the government and in the public sphere on topics such as climate, energy, national security, economic vibrancy, and the environment
• Combatting science denialism
(d) AS are potential co-signatories on position statements.
(e) AS could present ideas for collaborations like TEAM-UP that advance AIP’s role as a thought leader, with the potential for AIP to invest resources in the partnership. The affiliates get a seat at the table to weigh in on an important issue. What other issues could AIP tackle in this manner?
(f) Partnering with AS may present opportunities to defray costs incurred by each organization in shared endeavors. It could also enable AIP to pursue funding opportunities from sources that support initiatives across broad organizations.

How does this help AIP meet its strategic goals?
(a) AIP will have increased opportunity to facilitate collaborative relationships between MS and AS. (SG1)
(b) Creative partnerships with AS could provide both the content and the funding for study of the heritage represented by the AS. (SG2)
(c) Predicting the future is a tricky game, and AIP will need to constantly scan a diverse environment looking for emerging trends. Diverse AS could help AIP identify and act on those trends. (SG2)

IV. Tools to build and maintain meaningful relationships

*Deepen connections with existing AS*

(a) Communicate frequently with AS. Make sure they are aware of their status and the associated benefits. Start conversations about shared missions and priorities. Talk about other areas of possible collaboration.
(b) Identify the talents and resources at AIP that could be of use to AS.
(c) Have the SRC do an analysis of public-facing documents and mission statements to assess the needs, wants, and values of the current AS.
(d) Offer free samples of fee-based services to encourage AS to use them or repackage current services to better meet the AS needs.
(e) Engage affiliates in programs that AIP runs, such as oral histories. In addition to building a relationship and working together, it could also bring in external funding for projects through, for example, grants or agency budgets as the initial stages of a project (which may be funded by AIP) generate interest and excitement throughout an organization. This tactic would be particularly relevant for revenue generation in societies with close industry ties. It could also increase engagement with physicists in industry.
(f) Affiliates could get more access to AIP content. For example, discounted individual electronic subscriptions to PT for society members, or providing the society’s
offices/officers with free print magazines each month. Affiliates could also participate in generating PT content as experts in the field, by working with PT on a special issue to celebrate an anniversary, or by helping PT find authors for articles relevant to a society’s focus.

(g) Provide more opportunities for AS and MS to come together. For example, AIP could organize a workshop on fundraising best practices; MS could have a certain number of free attendees, and the AS could pay a registration fee to attend.

(h) Invite affiliates to apply for funding through a modified Venture Partnership Fund-like initiative.

Forge connections with potential new AS

(a) Identify areas in which adding new AS could contribute to a more diverse representation or information base.

(b) Identify areas in which a new AS could fill a knowledge, expertise, or skills gap that AIP needs to fill to advance its strategic framework.

(c) Take a “build it and they will come” approach. Once AIP accrues several successes in the area of thought leadership, it could use that as a draw for potential new partners.

Better relationship management

(a) Have a designated person at AIP whose job includes Affiliates engagement, relationship management, and outreach.

V. Tools to maintain an agile, adaptable AS program

Remodel the “one-size-fits-all” approach.

Each individual AS’s relationship with AIP can be unique. Even the MS show a lack of consensus around what they value about their partnership with AIP. Starting with a basic set of benefits, AIP could work with each society to identify ways in which they can collaborate on programs, events, etc. that would be mutually beneficial. The benefits could also be chosen entirely à la carte.

Maintain multiple points of contact

If there is only one point of contact between AIP and an AS—one person, one joint venture, etc.—the relationship may fall by the wayside if that point of contact is broken by, for example, a person moving to a new job or a program ending.

Institute a regular review process

Consider adding a mechanism to regularly communicate with each AS and add, drop, or change relationships over time as the needs of AIP and its AS shift. The program itself should also be
reviewed and adapted regularly to address the evolving needs of AIP and the MS. This would make AIP nimbler in its convener role and able to act based on new and changing information.

VI. Potential obstacles

_Resources and finances_

1. AIP will likely incur up-front costs to restructuring the AS program in exchange for future benefits.
2. Any new initiatives would likely not be revenue positive. That’s not necessarily a problem, but their financial sustainability will have to be assessed.
3. Providing additional benefits to AS could strain AIP’s resources, financial and otherwise.
4. Adding dues to the AS program can only bring in a limited amount of revenue (dues would have to be lower than MS dues) and could make the relationship feel more transactional, which doesn’t set the right tone. It also opens the door for AS to not feel like they’re getting their money’s worth, or for MS to decide to downgrade their status in order to reduce costs.
5. The cost of housing archives might be prohibitive. We also may not have the space, and the documents might not align with the library’s acquisition guidelines.
6. Managing an AS program that is highly diverse in its purposes could be unwieldy and dilute the potential impact of the program. Although this report presents a wide range of options, AIP may need to choose one or two primary objectives for the AS program and focus resources there. Ideally, the chosen path would simultaneously further multiple strategic goals.

_Preserving the value of membership_

1. MS might feel as though their privileged status is being threatened or their benefits as dues-paying members are being diminished.
2. In pursuing mutually beneficial activities, everyone must be a willing partner. Stepping on the toes of either AS or MS with AIP initiatives could cause offense or damage relationships.
3. A dual tier AS program could suggest a trajectory toward full membership that AIP may not be prepared to offer.
4. MS might also want a tailored set of benefits.
5. Expertise, training, programs, etc. that AIP can offer might overlap with what already exists at an AS.

_Resistance to changing course_

1. Revamping the AS program could lead to fewer AS in the short term.
2. A broader selection of societies could be less closely aligned with AIP’s mission; for example, societies might serve science/STEM more generally rather than just the physical sciences, and issues specific to the physical sciences could get overlooked compared to bigger picture issues

_Lack of familiarity with AIP and its mission_
1. Many AS members and staff do not know about the relationship with AIP and do not have much understanding of what AIP is and what it does.

2. AIP’s products and services are sometimes better known than the institute itself. MS members tend to relate more closely to their own societies.

VII. Next steps: Action items

*Interview current AS*

AIP should conduct a series of interviews with current AS officers to determine whether they want to continue the relationship and, if so, what they value about the relationship. If there is no longer interest in maintaining the relationship, it may be terminated. The interviews should also gather feedback on how the relationship could improve. The conversation should be carefully structured to ensure that AIP can extract as much information as possible to help determine a path forward. It should be developed in a collaboration between people with in-depth knowledge of the AS program and people with expertise in conducting interviews and surveys.

*Identify targeted outcomes*

AIP should identify outcomes that it would like to target, such as increased diversity in the sciences, shifting opinions on controversial issues like nuclear energy, or maintaining a workforce pipeline. Determine which outcomes are AIP’s highest priority and focus on achieving those goals.

*Inventory AIP’s expertise and skills*

Understanding AIP’s existing staff, abilities, and expertise will help identify what we are able to provide to potential AS. For example, AIP has experience with production of magazines, web articles, white papers, oral histories, surveys, reports, conference sessions, and public lectures. Using that inventory, brainstorm ways in which AIP can use its established products, services, and capabilities to bring value to its relationships with its AS. Identify ways in which AS could assist in efforts to fill gaps in AIP’s existing knowledge base or skill set, as well as ways in which AS relationships could help AIP meet a desired outcome.

*Initiate a pilot program*

Develop a pilot AS program based on the AS stated values and AIP’s desired outcomes. In particular, look for ways in which an AS can bolster AIP’s skills and expertise, and services that AIP can provide to an AS that the AS would find valuable. Identify a small test group of societies for the new model. The group could be determined by size, level of engagement, diverse representation, or other criteria. However, the group should be selected such that the test program is likely to be successful and such that the test program’s successes and challenges will be informative for future iterations and expansion.
Appendices

1. Member Societies and Benefits

AIP is a federation of 10 member societies that works to advance, promote, and serve the physical sciences community:

Acoustical Society of America
American Association of Physicists in Medicine
American Association of Physics Teachers
American Astronomical Society
American Crystallographic Association
American Meteorological Society
American Physical Society
AVS: Science & Technology of Materials, Interfaces, and Processing
The Optical Society
The Society of Rheology

Member societies pay dues of $7.85 per regular member and receive:

- Information exchange through MS Liaison Committees, which are financed by AIP and help develop initiatives on issues such as education, public policy, history preservation, and underrepresented minorities.
- Opportunity to participate in the AIP Assembly of Society Officers with reasonable travel expenses for the society president or designated representative reimbursed by AIP
- Access to AIP’s Venture Partnership Fund for collaborative partnerships supporting shared objectives
- Collaboration with AIP and other MS on joint outreach programs
- Preservation services from AIP’s History Program
- Government relations services
- Collaboration and joint membership with the Society of Physics Students
- Access to BoardSource
- Representation on the AIP Governing Board
- Fellowship administration
- Meeting support through student offerings, programs on careers outside academia, speakers for invited talks, and AIP exhibits
- MS members receive individual benefits:
  - Free print and online subscriptions to Physics Today
  - Eligibility to participate in APSIT insurance
  - Subscription discounts for AIPP journals
  - Access to history resources
  - Eligibility to apply for AIP’s public policy fellowships
2. Affiliated Societies and Benefits

In addition to its voting and dues-paying MS, AIP also has 27 Affiliated Societies who do not vote or pay dues:

American Association for the Advancement of Science Section on Physics
American Chemical Society/Div. of Physical Chemistry
American Geophysical Union
American Institute of Aeronautics and Astronautics
American Nuclear Society
Astronomical Society of the Pacific
Biomedical Engineering Society
Biophysical Society
Council on Undergraduate Research Physics/Astronomy Division
Cryogenic Society of America
The Electrochemical Society
Geological Society of America, Inc.
Health Physics Society
IEEE Nuclear & Plasma Sciences Society
International Association of Mathematical Physics
International Centre for Diffraction Data
International Union of Crystallography
Laser Institute of America
Materials Research Society
Microscopy Society of America
The National Society of Black Physicists
The Physical Society of Taiwan
The Polymer Processing Society
Society for Applied Spectroscopy
Society of Vacuum Coaters
SPIE
U.S. Section of the Combustion Institute

Affiliates agree to send AIP copies of their annual reports and receive a limited set of benefits:

- Opportunity to participate in the AIP Assembly of Society Officers
- AIP journal individual subscription discounts for Affiliated Society members
- Affiliate Society members are eligible to buy APSIT insurance
- Affiliate Societies may use AIP’s fee-for-service products:
  - AIP Career Network shared job board
  - Media services
  - Government relations services
  - Statistical Research Center services
3. Strategic Goals

**SG1: AIP will be a vibrant federation that advances the success of our Member Societies.**

a) Establish robust processes to identify and address mutual concerns on which AIP might partner with all or a subset of the Member Societies
b) Provide innovative mechanisms to build and sustain collaborative relationships among the Member Societies—and, where relevant, with other organizations—on topics identified by AIP and by Member Societies
c) Assist each Member Society in researching, analyzing, and addressing issues related to the evolving trajectory, needs, and desires of its membership community.
d) Create innovative approaches and practices to assist Member Societies with matters including society management, enterprise risk management, program sustainability and capacity, and strategic planning.

**SG2: AIP will be a center of excellence that advances the physical sciences enterprise through research and analysis aimed at improving the understanding of our heritage and promoting future progress.**

a) Research and develop innovative approaches to identifying opportunities for and challenges to the community of physical scientists on issues including public policy, education, scholarly publishing, the demographics of relevant scientific communities, and the professional development needs of the physical scientist from undergraduate to retirement.
b) Facilitate dialog and the interchange of ideas among physical scientists in the government, academic, non-profit, and private sectors to identify and address opportunities for, and challenges to, promoting progress in the physical science.
c) Execute research and analysis in support of the design and implementation of actions to promote diversity, equity, inclusion, and belonging in the physical sciences community.
d) Establish innovative approaches to both preserving and advancing the study of the heritage of the physical sciences and forecasting the trajectory of the physical sciences.

**SG3: AIP will be a trusted and reliable source of information and analysis.**

a) Build capacity to listen and understand better AIP’s diverse audiences and develop AIP’s communication channels to strengthen the value and impact to our audiences across the physical sciences and beyond.
b) Develop AIP processes to ensure our adherence to and reputation for transparency, impartiality, and independence in our communications on matters including public policy, the heritage of the physical sciences, and science news.
c) Establish AIP’s brand, so it empowers each member of our staff, our Member Societies, and other stakeholders to convey the vision of AIP as an independent federation and institute that advances the physical sciences.
d) Create innovative marketing and media approaches to storytelling about the dynamics of and advances in the physical sciences enterprise.
SG4: AIP will be recognized for cultivating an effective, talented, diverse, and engaged staff that delivers excellence to our stakeholders.

a) Evolve AIP’s workplace culture to cultivate appreciation of, passion for, and pride in how we pursue our mission.

b) Establish a model workplace environment that fosters collaboration, respect, diversity, equity, inclusion, and belonging, thereby improving our capacity to achieve excellence in all of AIP’s programs and activities.

c) Develop and adopt a comprehensive set of process standards and knowledge-management tools to strengthen and ensure timeliness, efficiency, and excellence in all that we do.

d) Embrace excellence, integrity, accountability, transparency, openness, innovation, environmental sustainability, and leadership every day, in every AIP job.

4. AIP Membership Classes and Bylaws References

CURRENT AIP MEMBERSHIP CLASSES

Voting

- Member
  - Any physical science membership society whose mission aligns with that of AIP and that is elected into Membership by the AIP Members.
  - Dues are currently $9.69 per capita, as set by the Board.
  - Benefits include a subscription to Physics Today for every Member member, and a variety of other programs, products, and services as described above and at https://www.aip.org/member-benefits

Non-voting

- Affiliated Societies
  - Any physical science membership society whose mission aligns with that of AIP and that is accepted an Affiliate by the Board.
  - No dues.
  - Very few benefits.

- Corporate Associates
  - Any corporation, institution, or government agency interested in the physical sciences.
  - Dues are based on the number of physicists employed in the Corporate Associate’s organization.
  - Benefits are currently being redefined, but have traditionally included an institutional subscription to Physics Today, advertising discounts, networking and leadership opportunities, and involvement in Industrial Physics Forums and other industrial events.

- Society of Physics Students
  - A partially self-governing student professional society with an honor society component, whose members are members of AIP and that is subsidized by AIP.
Dues are currently $24 per student member.

Benefits are vast, but include a subscription to *Physics Today* and a number of other scientific and professional development opportunities similar to those offered by other scientific professional societies. See: https://www.spsnational.org/about/membership/benefits-sps-national-membership

**BYLAW REFERENCES**

*Article IV: Membership*

Section 4.01: Classes of Membership

The Corporation shall have one class of voting members who shall be called Member Societies and such classes of non-voting members as the Board of Directors shall determine from time to time. The Member Societies (the “Members”) shall serve as the members of the Corporation under the N-PCL and shall be the only persons entitled to vote as members of the Corporation. Non-voting members shall not serve as members of the Corporation under the N-PCL and shall not be entitled to vote as members.

Section 4.03: Non-Voting Members

(a) Qualifications and Admission. Non-voting members shall have such qualifications, be grouped in such classes, and be admitted in accordance with such procedures as the Board of Directors determines. Persons admitted to membership in the Corporation as non-voting members shall not serve as members under the N-PCL and shall not be entitled to vote as members.

(b) Classes of Non-Voting Members. Upon the date these Bylaws become effective and until the Board of Directors determines otherwise, the Corporation shall have the following classes of non-voting members:

1) Individual members. Each individual person who is a member of a Member shall be considered an Individual Member of the American Institute of Physics.

2) Affiliated Societies. Any organization interested in the physical sciences with purposes that are aligned with AIP’s purposes, and elected as non-voting member by the Board of Directors shall be designated as an Affiliated Society of the American Institute of Physics.

3) Corporate Associates. Any corporation, institution, or government agency interested in the physical sciences and elected as a non-voting member by the Board of Directors shall be designated as a Corporate Associate of the American Institute of Physics.

4) Society of Physics Students. The Society of Physics Students shall be a non-voting member. The Corporation shall encourage interest and participation in the physical sciences through the Society of Physics Students with an honor society component named Sigma Pi Sigma (the “Societies”). The Societies shall be governed by a Constitution and Bylaws ratified by the Board of Directors of the Corporation.
Amendments to the Constitution and Bylaws of the Societies must be ratified by the Board of Directors of the Corporation.

**Article V: Fees, Dues and Assessments**

Section 5.01: Fees, Dues and Assessments

The amount (which may be zero) of fees, dues or assessments for each class of members, whether voting or non-voting, shall be fixed and determined by the Board of Directors from time to time; provided that the Board of Directors shall not increase the dues within twelve (12) months of a prior increase. Upon the date these Bylaws become effective and until the Board of Directors determines otherwise, dues payable by members shall be determined under the formula in effect on such date.

5. White Paper Team

**Team Members**

Catherine Meyers, Lead (Inside Science)
Christine Middleton, Lead (Physics Today)
David Reinbold (Marketing & Communication)
Peter Reppert (Web Development)
Yuen Yiu (Inside Science)
Benjamin Mangefrida (Finance & Accounting)
Sherry Render (Finance & Accounting)
Steve McAlister (Development)
David Zierler (History Center)
Paul Guinnessy (Physics Today)
Anashe Bandari (Media Services)
Vanessa Bridges (Meetings & Member Services)
Anne Marie Porter (Statistical Research Center)
Allison Rein (Niels Bohr Library & Archives)
Margaret Wiley (CEO’s Office)

**Meeting Agendas**

**Agenda 1 – January 27, 2020**

Brainstorming ideas for broad ways in which relationships with affiliate societies could contribute to AIP as both an institute and a federation. Guided by the strategic goals and Board consensus positions, we identified a diverse list of partnerships and benefits that could be part of a restructured or expanded affiliates program.

**Agenda 2 – February 6–14, 2020**
In-depth analysis of the list generated at the first meeting. The ideas from the first meeting were grouped into three categories, each associated with a broader theme:

- Diversifying AIP’s revenue streams for a more secure financial future
- Building coalitions to shape thought leadership and advance shared priorities
- Building networks to increase AIP’s reputation and influence

The team split into three small groups, and each group tackled the items associated with one of the above themes. Group members considered the following questions:

- Which strategic objective(s) would this help accomplish and how? How significant is the level of impact likely to be? What information would you need to gather in order to assess the likely impact?
- Could this hinder any strategic objective(s)? If so, how? Who would feel the negative effects and how strongly? What information would you need to gather in order to assess the magnitude of possible negative effects?
- What could AIP provide the affiliated society in return? What is the cost, if any, of that exchange? What characteristics might make a society more or less interested in the thing(s) AIP has to offer?
- Who should AIP consult to evaluate the proposed terms for any new type of relationship with affiliated societies? What information should they gather from each stakeholder during that process?
- Are there any other things that AIP should consider when deciding whether to pursue this avenue?
Supplementary Document 1: AIP Membership Classes

To: AIP Board Membership and Corporate Strategy Committees
cc: Michael Duncan (Chair, Finance Committee), Robert G. W. Brown, Cathy O’Riordan, Gigi Swartz, Liz Dart Caron
From: David Surman and Bo Hammer
Date: November 1, 2016
Subj.: Proposed New AIP Membership Class

The AIP Board Membership Committee, working with management, has developed the following proposal for a new AIP Membership class – Associate Member – that includes the benefits and responsibilities for this new class, and a reiteration of those for the Affiliated and Member class.

The Membership Committee proposes this new class to advance AIP’s Mission: to advance, promote, and serve the physical sciences for the benefit of humanity. In addition, adding an Associate class of Membership creates a new level within which AIP can achieve the Board’s strategic goals to grow the federation and for AIP to be more global; and it supports the Board’s directive that AIP should be more entrepreneurial in diversifying its revenue streams by creating new business opportunities.

This proposal also makes significant headway on meeting the criteria laid out by the Membership Committee in its November 2015 and March 2016 meetings, namely:

- Lower the barrier to Membership.
- AIP Membership should not be bound by geography, size, or longevity of existence of the organization.
- There should be levels of Membership that include a dues-paying/non-voting class.

Finally, note that we have guidance from AIP’s counsel that adding a new class of non-voting Membership does not require amending the AIP Bylaws. Please refer to the Appendix for a summary of current AIP Membership classes and the relevant sections from the AIP Bylaws.

The following proposal assumes that Member dues will remain at $9.69 per member and postpones the discussion of restructuring AIP dues.

**Proposed New AIP Membership Class, Dues, Benefits, and Responsibilities**

**Affiliated Member**
- **Dues** – none
- **Benefits**
  - Individual Affiliated Member subscription discount to *Physics Today*
  - Invitation to annual convocations of AIP Members, such as the Assembly of Society Officers
  - Access to fee-based AIP services on a cost ++ basis to be determined through AIP business planning, for such services as:
    - Media services – promotion of journal articles and conference talks
    - Government Relations – customized FYI, CVD, issue advocacy
    - Others TBD
- **Responsibilities** – Submit the society’s annual report (or equivalent) to AIP

**Associate Member**
- **Dues**
  - $3.00 per member (pending AIP Board review of the entire AIP dues structure)*
- **Benefits**
• All Associate Member members will receive the digital edition of *Physics Today* each month
• Invitation to annual convocations of AIP Members, such as the Assembly of Society Officers; AIP pays reasonable travel for the Member President or their designee, up to $500 for US-based Associate Members and up to $1000 for Associate Members based outside the US.
• Opportunity to nominate members to AIP advisory bodies
• Access to the above fee-based AIP services on a cost + basis to be determined through AIP business planning, plus:
  ▪ Media services – promotion of journal articles and conference talks
  ▪ Government Relations – customized FYI, CVD, issue advocacy
  ▪ Statistical research services
  ▪ Exhibit and meeting management services
  ▪ Others TBD

• **Responsibilities** – Submit the society’s annual report (or equivalent) to AIP and report on membership number

**Member**

• **Dues**
  ▪ $9.69 per each member of a Member Society

• **Benefits**
  ▪ Seat on the AIP Board of Directors, per AIP Bylaws
  ▪ Appointment of a Member Representative
  ▪ A seat on the AIP Publishing Board of Managers, for those Members that publish all their journals with AIPP
  ▪ All members of Member Societies will receive *Physics Today* in print and full electronic access (exceptions may apply to members with a non-US mailing address)
  ▪ Invitation to annual convocations of AIP Members, such as the Assembly of Society Officers; AIP pays reasonable travel for the Member President or their designee
  ▪ Opportunity to nominate members to AIP advisory bodies
  ▪ Access to the above fee-based AIP services at cost, to be determined through AIP business planning, and also to:
    ▪ Media services – promotion of journal articles and conference talks
    ▪ Government Relations – customized FYI, CVD, issue advocacy
    ▪ Statistical research services
    ▪ Exhibit and meeting management services
    ▪ Archival services – Only Member Societies have access to AIP archival services
    ▪ HR benefits services, and other association management services
    ▪ Others TBD
  ▪ SPS students can elect to become a member of up to two Member Societies
  ▪ Members of Member Societies are eligible to apply for AIP science policy fellowships
  ▪ Eligible to apply for grants from the Venture Partnership Fund

• **Responsibilities**
  ▪ Appoint a member to the Board of Directors and a Member Representative, per AIP Bylaws
  ▪ Full participation in AIP governance, including Board and Committee meetings, by the Board member and Member Representative, per AIP Bylaws
  ▪ Submit the society’s annual report (or equivalent) to AIP and report on membership number

*Note the $3 provisional dues is based on discussions with a potential Associate Member and a determination of what dues level would provide net positive revenue for AIP.*
Risk / Benefit Analysis of the Above Proposals

Adding a new, Associate, class of AIP Membership has risks and benefits. The following is an analysis of those risks and benefits.

New “Associate” Member Class

- **Risk to AIP:**
  - One or more current AIP Member Societies could opt to lower their Membership status. I have looked at the impact of up to two Members making such a move – OSA and AVS, for example – and then provided an assessment of why one or both societies downgrading to Associate Membership would be unlikely:
    - If OSA and AVS were to downgrade their membership status to Associate, the loss of revenue to AIP would be $148K. This loss would be primarily attributable to a dramatic lowering of OSA dues ($124K lower, vs. $24K for AVS).
    - Physics Today would also lose about 22K print subscribers, which would further threaten its advertising rate and ability to attract advertisers.

- **Risk to Members of dropping to Associate Member:**
  - The potential downside for any society that goes from Member to Associate Member is quite large, especially considering the relatively small impact as a percentage of their own revenues (lowering OSA’s dues would only save them about 0.3%; for AVS it would be about 0.5%).
    - These societies’ members would no longer receive *Physics Today* in print.
    - They would also lose their seat on the AIP Board of Directors.
    - If they publish all their journals with AIPP, they would lose their seat on the AIPP Board of Managers. Note: AIPP is not limited to partnering only with AIP Members.
    - They would lose their ability to influence AIP strategy, impact on the community, ability to weigh in on AIP policy matters, and other less tangible benefits accrued from being a voting member of a large federation.
    - In the case of the AVS example and others, they would lose access to highly valuable AIP services such as HR and payroll services.

- **Benefits to AIP of adding an Associate Member class:**
  - A route to Membership that grows the federation among organizations for whom full Membership is not desirable for any number of reasons, or among organizations that may not be suitable for full Membership.
    - The former category could primarily include Affiliated Members such as ECS, HPS, LIA, and MRS.
    - The latter category could include science-based identity organizations like NSBP and NSHP, and non-US organizations like PSROC. Note that all three of these societies have expressed interest in joining AIP, should an Associate class exist.
  - Net positive revenue from any US-based society over 500 members.
  - The barrier to Membership would be lowered in ways that would strengthen the AIP federation by making it more diverse, especially scientifically and demographically, thus advancing Goal 1 of the draft Strategic Plan.
  - An Associate class would provide an intermediate Membership step from which organizations could grow into full Members.
  - AIP is developing an institutional business model that would include Member-only priced, fee-based access to programs, products, services. Adding a new class of Membership has the potential to open up new markets for AIP that, in addition to the increased dues revenue, would also diversify and make more robust AIP’s sources of revenue.
**Moved:** The AIP Membership Committee recommends that the AIP Board of Directors resolve to create a new, non-voting, Associate Member class with benefits as defined in the Member Society benefits document reviewed by the Membership Committee on November 1, 2016.

**Moved:** The dues for Associate Members will be $3.00 *per capita*, pending a comprehensive review of dues for all AIP Member classes.

*White Paper Authors’ Note: The appendix on membership classes and bylaw references in the original document was removed because it is already included in Appendix 4 of the white paper.*
Supplementary Document 2: Affiliates Thought Paper

To: AIP Board of Directors
From: Membership Committee
Subject: Strategic Considerations on the Affiliated Societies
Date: August 21, 2019

Introduction

The purpose of this paper is to provide background on and analysis to guide the AIP Board of Directors discussion on the impact of the Strategic Framework on the Affiliated Society class of membership and its future trajectory.

This paper is framed in terms of the four Strategic Goals as approved by the BoD in June 2019 and the draft Strategic Objectives that have emerged over the past year of strategic planning. The analysis will consist primarily of a SOAR(R) (strengths, opportunities, aspirations, results and risks) analysis and a consideration of the extremes: A) suspending or eliminating the Affiliated Society class of membership, B) maintaining the status quo, or C) a restructure and growth of the Affiliated class of membership.

Key overarching questions driving this paper, and for the Board ultimately to consider, are: 1) How does having Affiliates advance the strategic goals? 2) If growing the AIP federation is a desired outcome, is restructuring and growing the Affiliates program the best way to achieve this? 3) what are the implications for resource allocation if services to Affiliates were added to AIP’s portfolio? All of these questions will, in time, also have to be considered in the larger framework of how full “membership” of AIP might be expected to evolve. What does membership mean for AIP as we prepare for the Institute’s second century?

Background

According to the AIP Bylaws, AIP membership consists of voting members of the corporation (AIP) -- its Member Societies -- and non-voting members, which includes the members of the Member Societies, Corporate Associates (a non-active group, at this time), SPS, and Affiliated Societies. The Bylaws define an Affiliated Society to be, “Any organization interested in the physical sciences with purposes that are aligned with AIP’s purposes, and elected as a non-voting member by the Board of Directors.” The Bylaws are silent on dues and membership criteria for non-voting members.

The Board of Directors and the Membership Committee have been developing AIP’s strategic posture with respect to membership, particularly regarding whether and when to add new Member Societies to the federation and how to realize AIP’s physical sciences scope. Discussions have been distilled into a set of Consensus Positions that are relevant to the federation and membership (Appendix A). The Consensus Positions provide insight and guidance as to how AIP might grow and strengthen the federation. Consensus Position 4 puts at least a temporary moratorium on adding Member Societies, while Consensus Position 2 encourages expanding AIP membership as essential to realizing the mission. Taken together,
the conclusion could be to examine the Affiliated Societies as a possible route toward achieving these ends.

Guided in part by the Consensus positions, and by a range of other inputs such as the White Papers and the products of outside consultants (dPrism and On Think Tanks), the AIP Board of Directors has approved four strategic goals for AIP (Appendix B) that will also inform the Board’s approach to membership. The Goals do not explicitly mention Affiliates, but the Federation Goal reflects an aspiration to be a “vibrant federation” and connects this aspiration to the success of the Member Societies. The Institute Goal speaks to advancing the physical sciences more generally. And the Excellence Goal aspires to deliver excellence to AIP’s stakeholders, which would include the Affiliates.

**AIP’s Current Engagement with the Affiliated Societies**

AIP currently has 27 Affiliated Societies (Appendix C). Affiliates do not pay dues nor does AIP provide them with a defined set of benefits. These include opportunities for information exchange, principally participation in the annual AIP Assembly of Society Officers, and eligibility for APSIT Insurance for Science Professionals. There is also no set expectations or aspirations for what it means to be an Affiliated Society, from AIP or the Affiliates themselves. Many Affiliates joined AIP years ago, to gain access to publishing services, prior to the formation of AIP Publishing, LLC, when AIP provided those services to a large number of societies. AIP’s Publishing’s business model moved away from this approach, following the formation of the LLC in 2013, and, in the absence of a renewal or discontinuation process, the current set of societies have remained Affiliates.

Nevertheless, a small number of Affiliates actively and productively engage with AIP at various levels. Examples of the more engaged Affiliates are:

- **AGU** – AIP actively archives AGU’s corporate records in the Niels Bohr Library & Archives. ([White Paper Authors’ Note: In editing, it was also brought up that AGU actively participates in AIP’s Publishing Dialog activities.]

- **Biophysical Society** – BPS has frequently participated in the Assembly of Society Officers and has been a sponsor of Inside Science, and up until recently has contracted with AIP for media services for their annual meeting.

- **NSBP** – NSBP has been active as a leader in the Liaison Committee on Under-Represented Minorities and partnered with SPS on PhysCon to get more African American students engaged and participating.

- **Physical Society of Taiwan** – TPS joined AIP as an Affiliate in 2017. Their stated goal was to have stronger ties to the physical sciences community in the US and have TPS-members access to the digital edition of Physics Today—including translations of selected PT feature articles in Physics Bimonthly, the TPS member magazine. To access PT content TPS pays AIP $3 per member ($1.50 per student member). This pricing structure was negotiated, based on what TPS could afford within their fiscal constraints.

- **Society of Vacuum Coaters** – SVC is a small society that joined AIP as an Affiliate in 2017 in order to take advantage of the networking opportunities at the Assembly and APSIT.

- **SPIE** – SPIE is a special case given that they have gone the farthest among any other society in taking steps to become a Member Society.

AIP’s relationship with these more actively engaged Affiliates provides clues as to how AIP might restructure the Affiliated Society member class so that all Affiliates are similarly partnered with AIP in ways that are mutually supportive in advancing common purposes. There is no one-size-fits-all value proposition for the Affiliates; rather, just as every MS has a unique and mutually beneficial relationship and partnership with AIP, so too might a restructured Affiliated Society membership program whereby each Affiliate joins the federation for the purpose of mutually advancing common missions, goals, and objectives.

Below, this paper considers three options: A) suspend or eliminate the Affiliated Society class of membership, B) maintain the status quo, or C) restructure and grow the Affiliates class.

SOAR(R) Analyses

A. Suspend or eliminate the Affiliated Society class of membership

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<tr>
<th>Strengths</th>
<th>Opportunities</th>
<th>Aspirations</th>
<th>Results</th>
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<tr>
<td>• Tighter strategic focus on the Member Societies.</td>
<td>• Expand Member Society engagement and services</td>
<td>• Full realization of the Federation goal, without</td>
<td>• A more contained federation.</td>
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<tr>
<td>• Clarity among staff about which organizations AIP serves.</td>
<td>(and recruiting?) on the current MS.</td>
<td>distractions from the Affiliates.</td>
<td>• Restructured Assembly to focus solely on MS needs</td>
</tr>
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<td>• Sunsetting the Affiliates would address the “need to do something” with</td>
<td>• Suspending/eliminating the Affiliates could be a</td>
<td>• A nimble federation that is responsive to its MS.</td>
<td>• Community reputation would be that of a strong</td>
</tr>
<tr>
<td>the program. (Having no strategy keeps it in open-ended limbo.)</td>
<td>tactic to respond to economic downturn or a</td>
<td>• Staff and budget resources fully committed to</td>
<td>federation keenly attentive to its MS.</td>
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<td></td>
<td>strategic shift away from growing the federation.</td>
<td>serving the MS, thus enhancing the Excellence</td>
<td>• Focusing on a fixed set of members could make it easier to measure</td>
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<td></td>
<td></td>
<td>goal.</td>
<td>and track AIP’s reputation as a thought leader.</td>
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Risks

• To the extent that AIP aspires to be a thought leader under the Institute Goal, smaller size could lead to a smaller audience and thus have reduced impact and reduced opportunities to be seen as a leader.
• A smaller federation could have reputational risk, particularly to the extent that with size comes opportunities for access and impact and reducing the size of the federation could be perceived negatively.
• AIP would have to start from scratch if we wanted to build up a network beyond its Member Societies.
• AIP could anger those Affiliates who do engage. Several Affiliated Societies were disenfranchised when AIP Publishing divested itself from offering publishing services to non-MS who weren’t full publishing partners. This move could be seen as a further insult.


## B. Maintain the status quo

### Strengths
- The Affiliates pay no dues and require minimal engagement from management, beyond the few examples described above.
- To a first approximation, the Affiliates program is mutually no cost with minimal benefit, yet AIP can, when it suits its purposes, engage with its Affiliates to advance its mission and sell its contract services.

### Opportunities
- The Affiliates who participate in the Assembly of Society Officers are an AIP audience, if only for a day, and this could have some positive impact on AIP's impact and reputation.
- Continue to consider new Affiliate applications as they are submitted, without active recruitment, so staff time remains minimal and program can minimally refresh.
- Leverage the Affiliated class to help execute AIP's increased convener role.
- Leverage the Affiliated class to tap expertise when suited to AIP's purposes, for thought leadership efforts and dissemination.

### Aspirations
- To fully realize the strategic goals and objectives by building off of today's AIP, including its current set of MS and the Affiliates program as-is.

### Results
- A fixed set of members could provide a defined and concise set of challenges for AIP to address as an Institute.
- Focusing on a fixed set of members could make it easier to measure and track AIP's reputation as a convener and a thought leader.

### Risks
- Carrying inactive Affiliates on the rolls could send a message of AIP neglect or irrelevance.
- In the absence of a formal relationship with the Affiliates, AIP could be missing opportunities to extend its mission and sphere of influence.

## C. Restructure and grow the Affiliates program

### Strengths
- Broadened reach into the physical sciences.
- A federation of physical science societies that goes beyond the current set of relationships.
- Richer participation in the Assembly of Society Officers than AIP would have with only its current MS participating.

### Opportunities
- Increased access to the community of physical sciences organizations enables AIP to facilitate direct connections and/or partnerships for its MS.
- A broader coalition to support AIP or MS policy objectives.
- Possible expansion of ideas and partnerships with the Venture Partnership Fund.
- More customers for AIP services such as surveys and public information support.
- Access to broader disciplinary talent to advise on AIP programs.
- Broader audience base for AIP programs & products.
- An engaged pool of potential MS if/when the Board is ready to add MS.
- Potential new business models for Physics Today.
- Expanded student perspective, through SPS, of scientific fields beyond those of the current MS.
- Revenue from dues.
- Fees for products and services.

### Aspirations
- Restructuring and revitalizing the Affiliates program could be an essential mechanism for AIP to realize the full depth and breadth of its strategic goals and objectives, particularly during a period which AIP is not adding MS.

### Results
- Expanded network of partnerships to enable AIP to more effectively advance its mission.
- Increased audiences and subscribers to AIP content such as Physics Today, Physics Today
Increasing the size and vibrancy of the federation could lead to more funding, visibility and impact.
• Stronger partnerships to support AIP’s convening role.
• Greater size, visibility, and impact can lead to positive feedback that has positive benefits for AIP, its MS, and the Affiliates.
• Increased visibility among broad audiences and stronger impact on society from the fruits of research funded by the federal government and the private sector.

Online, FYI, SRC reports, and News & Media products.
• The Assembly of Society Officers being oversubscribed or pressured to expand the program.
• More requests for AIP to address common community challenges (as an Institute) and increased opportunities to disseminate the findings. There could be positive feedback in this regard too, including greater opportunities to raise external funds to support these efforts.
• More partnerships between Affiliates and MS that advance common missions, goals, and initiatives such as in policy, education programs, diversity/equity/inclusion/belonging initiatives, and convenings among scientists in emergent areas of cross disciplinary research.
• A larger federation, especially more MS at some point.
• Increased revenues from dues and fees for services.

Risks
• Limited staff resources are spread too thinly to serve adequately the MS and the growing number of Affiliates.
• AIP’s lack of focus on the MS couple with increasing the number of Affiliates damages AIP’s reputation as an effective federation.
• Defining a new Affiliated class of membership could undermine the value proposition for the Member Societies.
• Depending on the cost/benefit structure, Member Societies might opt to downgrade membership to Affiliated status.
• Too many Affiliates could diminish the quality of the interpersonal interactions at the Assembly.

Key Questions for the Board
The above analysis provides the Board with a summary of the major strategic considerations regarding the Affiliated class of membership. Following are some key questions the Board may want to consider:

• What is missing from this analysis?
• What is the desired rationale and outcome for AIP’s having an Affiliated class of membership?
• Is the Board willing to consider adding either a new, non-voting dues-paying class of membership or changing the Affiliates to dues-paying?
• How should the Board consider the Affiliates in the broader context of understanding what it might mean going forward to be an AIP dues-paying Member Society and in the context perhaps taking a fresh look at the Bylaws with regard to membership?
• If access to Physics Today is a desired outcome of the Affiliates under a new structure, how could or would the AIP business model evolve, and what would be the impact on the value proposition for Member Societies?
• Is the charter of the Membership Committee appropriate, and might it need to be revised once the membership posture is more clearly defined?
Key Considerations for Management

Any changes to the Affiliates program could have impacts and opportunities that cut across AIP. Here are some that could arise:

- How would management’s implementation of the strategic framework change depending on which membership direction the Board decides to take?

- At what point and under what conditions should management reach out to current and potential Affiliates to test the market for a restructured Affiliates program?
  - What is the elevator speech that compels the discussion?
  - What are the right questions?
  - Which societies should be approached?

- What are the staff requirements to manage an Affiliates membership program that is significantly more active and engaged than we have now?

White Paper Authors’ Note: The original 3 appendices from the document were removed because they were either included earlier in the white paper (AIP Strategic Goals – Appendix 3 and AIP Affiliated Societies – Appendix 2) or were superseded by the strategic framework (Board Consensus Positions).