



Information for Task Group Chairs

The project-based structure of IUPAC makes Task Groups a key mode for implementation of the IUPAC mandate to enhance and improve communication worldwide among scientists in the chemical sciences. The Task Group Chair is responsible for the implementation of the project and, subject to approval by the Division Committee, for the appointment of the Task Group Members. He/she decides how the budget will be spent and should report periodically to the monitoring body as to progress toward the stated goals. The project will be evaluated retrospectively according to established criteria.

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1. ACCOUNTABILITY

A permanently constituted body of IUPAC such as a Division Committee or Standing Committee will have the responsibility to monitor the progress of the project. In some cases projects are funded jointly by two bodies, and one will be designated the lead group.

As soon as the funding is in place, the Task Group Chair will be contacted by the monitoring body to establish how communication with the Task Group will be maintained. As there can be significant delay between the time a proposal is submitted and subsequently funded, the milestones may need to be revised. A plan for project implementation should be updated and presented.

The Task Group Chair should plan to make at least a yearly report on progress. This should include minutes of any meetings held, description of progress toward stated goals, and revisions of goals should this be necessary. If the project includes a Workshop, then a more specialized report is appropriate (see below). Although the budget information will be available through the Secretariat, a brief discussion of how the budget is being spent is also appropriate as part of a periodic report.



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2. BUDGET

When a project is funded, it is provided a specific budget that is limited to the lifetime of the project as given in the proposal. It is the responsibility of the Task Group Chair to approve and monitor expenses.

The individual Task Group Members are requested to obtain from the Secretariat a Claim Form for travel or other expenses. This should be submitted to the Secretariat, which will then obtain approval from the Task Group Chair.

Because the project is funded as an independent entity, the expenditures must not exceed the amounts allocated. If additional funds are needed, then a supplemental application should be filed at least six months in advance of the time that the funds are needed. In any case, it should not be assumed that the additional funding is available until the project supplement is formally approved.

A major part of most project budgets is devoted to travel and per diem expenses. These expenses can be minimized by: a) Planning travel when air fares are low (low season, weekend stay over, etc.); b) Negotiation of “package” deals at hotels or conference centers; c) Scheduling the Task Group meeting in connection with an international conference. This has the additional advantage of permitting the participation of members of the scientific community not formally part of the Task Group; d) Conduct as much business as possible by e-mail and/or by employing a limited access website. The possibility and cost of teleconferencing should also be explored.

Task Group Members should be proactive in promoting their IUPAC activities and recommendations within their respective professional groups. It may be appropriate at some stage of a project to convene a group of “external” experts to advise on project development. It is relatively inexpensive to convene such a group for lunch before, after, or during an international meeting. It is very important to establish such a dialog to assure that the goals of the Task Group are of interest and relevance to the scientific community.

3. OUTCOMES/PUBLICATIONS

Since there is a wide variety of projects being carried out, the mode of dissemination of the work of the Task Group may vary considerably. The normal practice would be preparation of a report that would appear in *Pure and Applied Chemistry (PAC)*. Such reports fall into two categories: *Technical Reports* and *Recommendations*. In the former case, a manuscript prepared by a Task Group will be reviewed by the Division Committee/Standing Committee that will establish a review procedure. The report will then be formally approved by the Division President or Chair of the Standing Committee. The manuscript will then be reviewed by ICTNS prior to publication. The purpose of this process is to ensure consistency in the use of recommended terminology, symbols, nomenclature, and in some cases, procedures. A discussion of the differences between reports and recommendations can be found in the IUPAC Handbook - see appendix for additional information on *Publication Matters*.

If the Task Group effort involves *recommendations*, then the procedure is set out formally in the IUPAC Handbook. The major difference between the review processes for technical reports and recommendations is that the latter require a review by a large group of outside experts (~15) and a public comment period. This is done to ensure that *IUPAC Recommendations* represent a consensus of the affected community of chemists.



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Primary publication should be in *Pure and Applied Chemistry*. It is particularly important to maintain the IUPAC Journal as the repository for all *Technical Reports* and *Recommendations* on nomenclature, terminology, units, and symbols.

If the work of the Task Group involves the development of a critically evaluated database, the ownership of the database and who will maintain it after the project is completed should be clearly established at the beginning of the project.

4. OUTCOMES/WORKSHOPS

IUPAC does not normally support travel to general scientific conferences, so Workshops financed by IUPAC should have a “product” as their objective. This could be a *Technical Report* or *Recommendation*, or a monograph (*i.e.* a compilation of contributions by the workshop participants). It should be made clear to the participants as the workshop is organized that they will be expected to make a defined input. For example, if the workshop has an educational component, the resulting materials might be made available for further instructional purposes.

A report on the workshop should be made available to the Division Committee or Standing Committee indicating the program and the names and affiliations of participants. It may also be appropriate to ask the participants to evaluate the usefulness of the Workshop by employing a questionnaire.

5. DISSEMINATION

Publication of the findings of a Task Group is not a sufficient mode of dissemination. The difference between publication and dissemination is the difference between a product and publicity about a product. The purpose of a dissemination plan is to ensure that the results of the project, the publication, are made known to the relevant community of chemists and that these results are used by that community. Every possible effort should be made to encourage journal editors to adopt IUPAC recommendations. Many are reluctant to impose regulations on authors, but they are often willing to: publish recommendations in the journal, put the recommendations on the journal web site, or establish a link between the journal and IUPAC web site where recommendations are freely available.

It is recommended that from the outset Task Group Chairs give careful consideration to determine the audience towards which their work is directed and optimum methods through which their results and reports will be disseminated.

Although primary publication in *Pure and Applied Chemistry* is the norm, the projects outcomes should, where feasible, be published, in addition to *PAC*, in one of the leading journals in the relevant field so that it reaches the scientific community on which it is intended to impact.

Task Group Chair should produce, in addition to the formal project report, an abstract for posting on the IUPAC website and a short article suitable for publication in newsmagazines and list servers. Both of these should give the principal results and provide a reference to the primary publications.

Where it will be of assistance to the rapid introduction and use of the *recommendations* emerging from a project, the report should also be available for dissemination in electronic form such as CD.



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The Secretariat will establish, maintain, and make available to Task Group Chairs a list of contacts in IUPAC National Adhering Organizations (NAOs) and National Chemical Societies to whom promotional material can be sent for further dissemination or publications in national chemical journals.

The Secretariat will establish and, where appropriate, make available to Task Group Chairs a mechanism through which press releases may be issued to the science editors of major newspapers and scientific publications throughout the world.

6. RETROSPECTIVE EVALUATION

Evaluation of projects takes place two years after the completion of the project and will be based on the following criteria:

- The project must be important for the Chemical Sciences and be consistent with the goals of IUPAC.
- IUPAC should be the appropriate organization to undertake this project.
- The product or outcome of the project should fulfill the stated objectives.
- The project should conform to plan, including timing and use of the budget.
- The outcome of the project should be effectively disseminated.
- The project should have impact on IUPAC and the relevant scientific community.
- The project should increase the visibility of IUPAC.

In order to carry out this task the Evaluation Committee needs certain documents. These documents are collected by the Secretariat at the time of the completion of the project since some of them might be difficult to obtain when it is time to do the evaluation. The collection of documents related to a particular project constitutes the file for the project.

The necessary documents are:

1. The product of the project, usually a copy of the published report or recommendation.
2. The project submission form and any reviews obtained during the approval process.
3. All status reports produced during the lifetime of the project.
4. The Standard Measures Report (*see Section 6.1*).
5. A Final Status Report (*see Section 6.2*).
6. An evaluation of the completed project from the Division/Standing Committee.
7. Any update of items 4, 5 and 6 provided at the end of two years.

Items 1, 2, and 3 are supplied by the Secretariat from their records; the Standard Measures Report will be compiled by the Secretariat based on information in its records or obtained from outside sources (e.g. citations); and the Final Status Report will be requested from the Task Group Chair.



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6.1. STANDARD MEASURES REPORT

The Secretariat will compile a report including:

Project title and number

Monitoring IUPAC body (i.e. responsible Division/Standing Committee)

Standard Measures:

1. Duration (date of initiation and completion)
2. Product or Outcome
3. Mile stones
4. Total financial IUPAC support
5. Citations
6. Book sales
7. Hits on a web site (IUPAC)
8. Number of people involved
9. Names of Task Group Chair and Members

The Secretariat will send this report to the Task Group Chair and the Division Committee.

6.2. FINAL STATUS REPORT

The Task Group Chair should prepare a Final Status Report of no more than two pages that addresses the following issues:

- What is the impacted community?
- Was there co-publication?
- Are the evaluated data developed by this project incorporated in commercial databases?
- Have the recommendations of this project been adopted by journals, textbook authors, or other organizations?
- Have there been articles in the scientific press on this project?
- Have the standard methods proposed by this project been adopted by industrial or governmental organizations?
- Do these data form the basis for standard models used in the field?
- Does this project have, or could it have after suitable modifications, industrial applications?
- Have the results been presented and discussed at important scientific meetings?
- Has the project initiated activity that has earned funding from non-IUPAC sources?
- Do the results lead to initiation of new, especially interdivisional, activities?
- Do the results identify new areas where IUPAC can play a useful role?
- Is the profile of IUPAC enhanced by the results of the project?
- Was the project management by the Division/Standing Committee helpful?
- Would you ever undertake another IUPAC project?
- Was the support from the Secretariat sufficient?
- Any additional comments?



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The Task Group Chair will send copies of this Final Status Report to the Division/Standing Committee and to the Secretariat. The Division/Standing Committee will then send its evaluation of the project to the Secretariat.

Two years after the completion of the project, the Secretariat will gather updates on the Standard Measures Report along with the Final Status Report and the evaluation by the Division/Standing Committee. The project file will then be submitted to the Evaluation Committee who, and – if applicable – with the use of the reviews by external experts, will proceed with the project evaluation.

7. HELPFUL DOCUMENTS

Claim Forms

Project Funds are obtained using Claim Forms. A description of how to submit a Claim Form is available on IUPAC website at <www.iupac.org/home/projects/information-for-task-group-chairs/claim-of-expenses.html>

Other IUPAC policy or procedures

Listed below are various documents that describe IUPAC policy or procedures as they relate to the work of a Task Group Chair. All of these documents are published in the *IUPAC Handbook* and available on the IUPAC web site.

1. Guidelines for Drafting IUPAC Technical Reports and Recommendations, *IUPAC Handbook*, Appendix IV.
2. Procedure for Publication of IUPAC Technical Reports and Recommendations, *IUPAC Handbook*, Appendix III - see also the Appendix to this document.
3. Recommended Policies and Procedures for Handling Copyright in IUPAC Projects, *IUPAC Handbook*, Appendix V.

Questions?

If you have questions about any of the above, please write the Executive Director, e-mail: secretariat@iupac.org.

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APPENDIX: PUBLICATION MATTERS

Most IUPAC projects result in a publication, printed or electronic. A part of the project planning should be the consideration of the form this publication should take. The most common form is as a technical report or recommendation published in the IUPAC journal, *Pure and Applied Chemistry*. The procedure for publication is described in Appendix III of the *IUPAC Handbook*. Appendix IV of the *Handbook* contains advice for drafting technical reports and recommendations. IUPAC policy with regard to copyright is described in Appendix V. Some IUPAC projects are best presented as books while others are best published as electronic documents, especially as online databases or CD-ROMs. Considerations that determine which form of publication is most appropriate for the results of a particular project are outlined below.

TECHNICAL REPORTS AND RECOMMENDATIONS

In planning a project, the first consideration is whether this project will result in a *technical report* or *recommendation*. Appendix III of the *Handbook* describes the differences between the two and should be consulted during the planning stages. Online publication or CD-ROMs are usually considered forms of technical reports. Books are a special case and should in general not be considered before consulting the Secretariat about the intended audience and possible publishers.

If the result of a project is to be a *recommendation*, the project plan should take into account the need for review of the document by outside experts and the requirement for a public comment period.

Technical reports do not have the same requirements for review as do recommendations. However, they must be reviewed by the Interdivisional Committee on Terminology, Nomenclature, and Symbols (ICTNS). ICTNS review is required to ensure that IUPAC recommendations regarding the use of nomenclature, terminology, and symbols have been followed. Before ICTNS review can take place, the Division Committee responsible for management of the project must approve the report. The Division Committee can require a review by outside experts if it feels that this is necessary.

All *technical reports* and *recommendations* published in *PAC* are available online as part of the *PAC* archive on the IUPAC website.

Publication of a *technical report* solely in a journal other than *PAC* requires special permission and should be discussed with the Division Committee and with the Secretariat when the project proposal is being reviewed and before the project is approved. Publication elsewhere after publication in *PAC* can be part of a dissemination plan and is often an excellent way to make the results of a project known to the relevant community.

PAC SPECIAL ISSUES

Special Issues of *PAC* can be the preferred way to disseminate the results of an IUPAC-sponsored workshop on a topic of special interest. Before planning to publish the results of a project as a Special Issue, the Special Topics Editor of *PAC* should be consulted. Not all projects or workshops meet the requirements for publication as a Special Issue. These include appropriate peer review, a topic that is both timely and of interest to an audience beyond specialists in the field, and authors that are of the highest quality. For all of these reasons the Task Group Chair should discuss plans for publication of a Special Issue with



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the Special Topics Editor well before discussing the possibility of a Special Issue with potential contributors.

DATABASES AND CD-ROMS

Databases and glossaries are usually best published electronically, either online or as a CD-ROM. The construction of an online database should be done directly on the IUPAC web site rather than on another computer system. The reason for this is that transfer of a completed database from one web site to another can often involve as much work as its development in the first place. The Secretariat can provide access to a portion of the IUPAC web site for database developers. It is important that IUPAC developed databases be hosted on the IUPAC web site to avoid the possibility of material hosted on another computer system becoming unavailable due to changes in policy by Universities or other institutions or changes in the interests or institutional affiliation of the original developers. The ownership of the database should have been clarified before embarking on the project.

A major consideration when planning an online database is maintenance. This includes both the revision of existing data and the incorporation of new data. The Secretariat does not have the expertise to do this. The project plan for a database project should include ongoing maintenance as part of the plan.

The creation of a CD-ROM can be as simple as burning a set of existing files on a disk for distribution or can involve a major programming effort to develop an interactive disk. Small numbers of copies of a CD-ROM can be made by the Secretariat. If distribution of a large number of disks is planned, the Secretariat can arrange for this to be done by an outside service but the costs of doing this should be included in the project budget.

BOOKS

Revisions of the IUPAC books on nomenclature, terminology, and symbols – the color books – are special situations and are managed by the appropriate Division Committees. The decision to produce a book is one that needs careful study before the project is submitted. In many cases books are no longer the best way to present the results of an IUPAC project. Glossaries, for instance, are now better published online or on CD-ROM, or both. Publication of a glossary in electronic form allows searching and also enables a new glossary to be integrated with other IUPAC glossaries, such as the Gold Book.

In general, IUPAC does not support financially the publication of textbooks or standard scientific monographs. If a book is judged to be the best vehicle for publication by the group proposing a project and the Division Committee, a prospectus should be developed so that the Secretariat can approach publishers and negotiate a contract with the most appropriate and interested publisher. It is important that this be done before work is actually begun on the book to avoid disappointment after the book is almost completed. IUPAC does not subsidize the publication of books, and only books judged by a publisher to be commercially viable can be published.

If a decision is made to prepare a book for publication, the manuscript must be submitted to ICTNS for review of conformity to IUPAC standards for nomenclature, terminology, symbols, and units. Details of this procedure are described in the section “Procedure for Publication of IUPAC Technical Reports and Recommendations, and IUPAC-Sponsored Books”.