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Members' Handbook

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Referenced Documents

The ruling issue of each document referenced from the Members' Handbook can be found on the IOM International website at <http://www.theiom.org>

Invitation to Comment

IOM is a dynamic organization which continues to develop and expand rapidly owing to the growing global interest in the challenge of obsolescence. As a result, the Members' Handbook may sometimes be slightly out-of-date, or may not cover a topic that would be helpful. If you would like to request changes or additions for inclusion in the next edition, please let us know by sending an email to the IOM International Secretariat at admin@theiom.org.

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1 Purpose of the Members' Handbook

Members must comply with the regulations of IIOM International and their local IIOM Chapter as stated in this Members' Handbook. The Secretariat of each IIOM Chapter is responsible for issuing the Handbook to their new members and ensuring that it is available on the Chapter's website.

The Handbook describes how the International Institute of Obsolescence Management Ltd (herein after referred to as IIOM International) operates on a day-to-day basis for the mutual benefit of all participants. Your IIOM Chapter may give extra information about how IIOM operates in your region in an Annex to the Handbook.

2 General Introduction to IIOM

IIOM International is a professional body for those involved in, or interested in, Obsolescence Management. The Institute is for professionals worldwide who are dedicated to furthering their knowledge and understanding of the Obsolescence Management discipline and who would like to network with a wide group of other professionals from a global membership.

IIOM International developed from the Component Obsolescence Group (COG) by a change of name and Articles of Association in 2015. COG was originally formed in 1997 to bring together all those concerned with the electronic equipment manufacturing industries and their supply chains. The aim was to promote discussion and solution sharing around the growing problem of managing component obsolescence, especially the impact on the viability of long-life products and systems.

Since that time, the scope of the problem has extended to cover other tangible items such as mechanical, chemical, materials or software, intangible items such as information, knowledge or experience, and obsolescence in processes, facilities and people. The increasing impact of this problem on a global scale is the major driver for the continued expansion of IIOM.

IIOM International is an umbrella organization which operates through regional IIOM Chapters with which it has established Delegation Agreements. The IIOM Chapters are independent legal entities established according to the jurisdiction in their region, but they also inherit rights and responsibilities through their Agreements.

Individual and Corporate Members subscribe to an IIOM Chapter of their choice. Each IIOM Chapter organizes activities and events locally. IIOM International organizes the International Conference and various central services for members.

Chapters are established in France, Germany, India, the UK and the USA. IIOM International has ambitions to develop further Chapters as recognition of the discipline grows. Chapters are added when they have complied with the policy and process for Chapter formation and have signed a Delegation Agreement with IIOM International.

2.1 Our Purpose

The vision of IOM International and its Chapters is to become the world's leading, recognized and accepted organization for Obsolescence Management. Our mission statement is to:

- Advance the science and practice of Obsolescence Management.
- Promote and recognise high standards of professional competence.
- Open opportunities for development and career paths for practitioners.
- Generate widespread awareness and understanding of the discipline.
- Support the growth of specialist service providers affiliated with IOM.

2.2 Your Benefits

The major benefit of participating in IOM is the opportunity to discuss obsolescence issues with other practitioners who have experienced similar problems. This applies equally to Individual Members, who may be challenged by urgent and difficult situations, and Corporate Members who have the potential to provide solutions. In the workplace, obsolescence practitioners are often sparsely spread with limited peer-to-peer contact. IOM answers the need for wider networking opportunities with other experts in the state-of-the-art.

IOM International is also committed to the Professional Development and recognition of individuals and the accreditation of organizations against recognized international standards. Various initiatives are being pursued with authorities such as the UK Engineering Council and organizations concerned with establishing and operating quality assessment systems.

Members' benefits include:

- The IOM International website <https://www.theiom.org> which provides extensive information and links to IOM Chapter websites and other obsolescence management resources including:
 - For Individual members, access to resources to support your Professional Development. Options are being explored with the proposed Alliance partner for later implementation.
 - For Corporate Members, access to the list-server that we use to enable manufacturers and solution providers in the resolution of specific issues. The list-server is often used by members in attempting to source difficult to find components. This is an opt-in service with controlled access.
 - Information on the benefits of joining IOM.
- Websites provided by the regional IOM Chapter to which you are affiliated. These provide local content created by the Chapter such as an events diary, and speakers' presentations delivered at past meeting and events.

- Opportunities for Corporate Members to sponsor the IOM International and IOM Chapter websites and members' meetings and events held at locations throughout each IOM Chapter's territory, and which include presentations, workshops, discussion groups and networking opportunities. For more information about sponsorship please contact IOM International Secretariat at admin@theiom.org or the Secretariat at the Chapter of interest.
- IOM membership gives you the opportunity to influence standards organisations such as IEC, AFNOR, BIS, BSI, SAE, and VDE by participating in committees responsible for developing and revising guides and standards for Obsolescence Management and related topics such as anti-counterfeiting and through-life engineering. There is also an opportunity to contribute to consultations on policy, legislation and regulation as may be initiated by industry regulators, government departments, and UK Engineering Council from time to time.

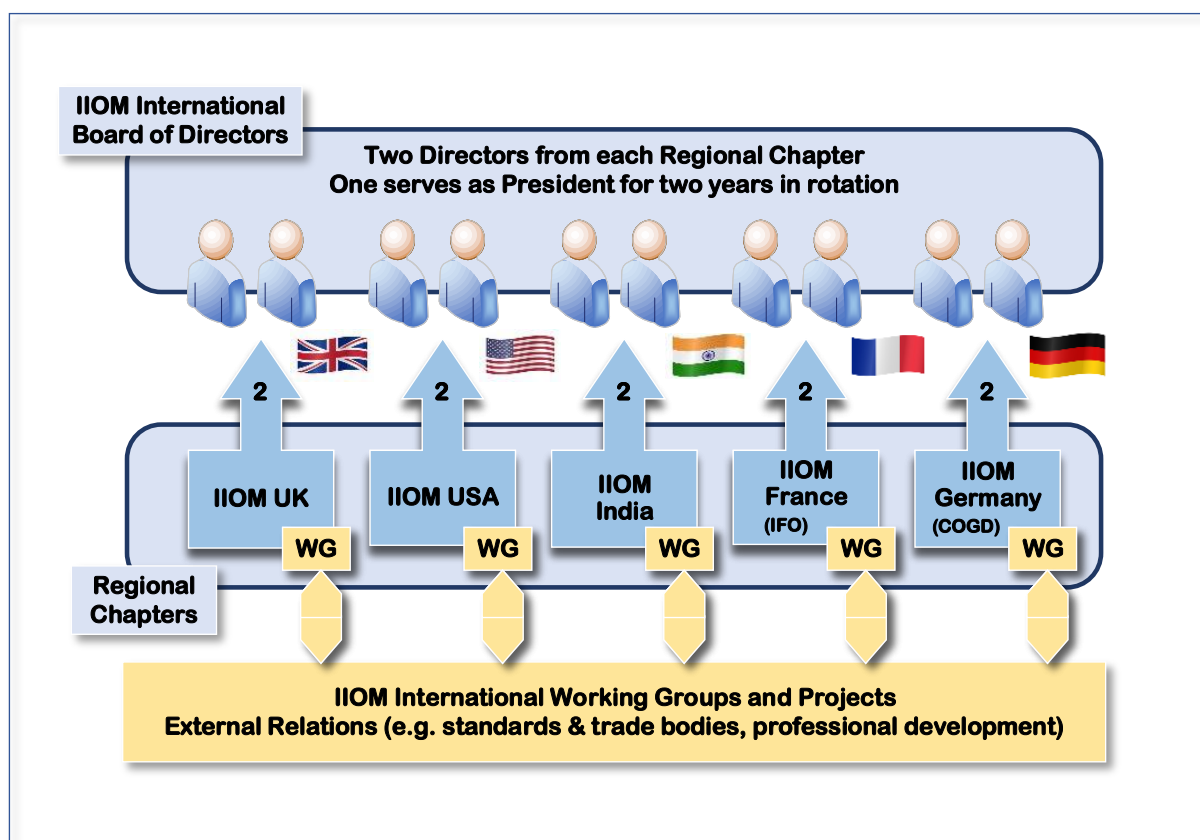
IEC	International Electrotechnical Commission	https://iec.ch
AFNOR	Association Française de Normalisation	https://www.afnor.org
BIS	Bureau of Indian Standards	https://bis.gov.in
BSI	British Standards Institution	https://bsigroup.com
SAE	SAE International	https://www.sae.org
VDE	Verband der Elektrotechnik Elektronik Informationstechnik e.V.	https://www.vde.com

- Guidance Booklets – utilising the expertise within the membership, a series of booklets on best practice have been published on a wide range of issues related to Obsolescence Management. These are available in English in pdf form from the IOM International Secretariat. To enquire please send an email to admin@theiom.org.
- The IOM International Conference is a two to three-day event held every two years which attracts respected globally recognised participants and speakers.

The Conference welcomes contributions from all industry sectors and all parts of the supply chain from the suppliers and solution providers, through the OEMs and system builders, to the customers and end users. It also welcomes speakers from academia and Government.

3 IIOM International

3.1 Legal Status



IIOM International is registered in England & Wales as a private company and the Company Registration Number is 05327680. The Articles of Association are available from Companies House, <https://www.gov.uk/government/organisations/companies-house>. The Articles of Association define the legal identity and legal reporting requirements and Companies House lists the current and resigned Directors.

IIOM International has a legal relationship with each of the IIOM Chapters through a series of Delegation Agreements.

3.2 Officers

The governance of IIOM International is the responsibility of the International Board. The Board comprises two Directors nominated by each Chapter that has a valid Delegation Agreement and a Company Secretary who is a non-executive Director.

3.2.1 Chapter Nominees

There are two nominee Directors from each IOM Chapter:

- The first is the Chairperson of the Chapter Council, who will also be one of the Chapter Directors. Their term of office continues while they remain Chairperson of the Chapter Council.
- The second is another Chapter Director elected by the Chapter Council. Their term of office is three years and can be extended by election of the Chapter Council but ends earlier if they cease to be a Director. If the International Board becomes too large owing to future growth in the number of IOM Chapters, the second Chapter nominee may no longer be needed. In the meantime, having a second nominee ensures that the size of the Board is commensurate with its responsibilities.

3.2.2 Company Secretary

The role of Company Secretary may be fulfilled either by one of the Directors or a separate person. The Company Secretary has delegated responsibility on behalf of the Board to discharge statutory duties to UK Companies House and Her Majesty's Revenue & Customs (HMRC), e.g. in respect of the annual return, annual accounts, tax returns, and payment of tax liabilities. In fulfilling these duties, the Company Secretary receives advice and support from the Company Auditor.

3.2.3 Remuneration Policy

The Officers as defined in Section 3.2 are unpaid but may be reimbursed for routine travel and subsistence expenses incurred on regular IOM business if they are not supported by their employer. For major projects such as support for new Chapter formation, or overseas meetings of standards committees, the usual practice is that the likely expenses are reviewed in advance and a suitable budget is agreed.

3.3 Role of the Directors

The Directors on the International Board decide the strategic direction, policies and initiatives needed to best serve the current members, and position IOM for future growth. The priority is to ensure that IOM as a whole remains relevant, innovative and sustainable over the long term. They have a key role in promoting the value proposition of both IOM International and their own IOM Chapter to the wider community in industry, academia and government.

Each Director is invited to engage with the debates and decisions on strategy, policies and initiatives by contributing their own knowledge and experience. They typically help to put these decisions into effect by taking responsibility for leading a particular aspect of day-to-day operations, a Working Group, or a Committee according to their expertise.

In doing this each Director takes care to accurately represent the views of their own Chapter Council. They also consider the views of other IOM Chapters because it is recognised that no single Chapter has a monopoly on experience, good ideas and solutions. They also provide feedback to their own Chapter Council on decisions and activities at IOM International level so that two-way communication is continuously maintained.

The co-ordination of members' events and provision of efficient central services receives close attention because this helps to deliver good value for members. The IOM and Chapter Directors are responsible for ensuring that every opportunity is taken to achieve this through effective collaboration across the organization.

3.3.1 Legal Responsibilities

The Directors of IOM International have the legal responsibility to ensure that it conforms with UK legislation and regulation, and to ensure that IOM as a whole remains solvent and does not commit any financial irregularities. To comply with these requirements the Directors shall:

- Maintain oversight of IOM Chapters, Non-Executives, Secretariat, Working Groups, and Committees. Where necessary, to question and cause to be overturned any decision made by any party within the IOM community which in any way jeopardises the organisation, results in it operating outside the law, causes financial irregularities, or gives rise to reputational damage.
- Maintain oversight of the process by which each IOM Chapter incorporates and manages a suitable legal entity according to the local jurisdiction.
- Maintain oversight of expenditure against authorised budgets during the current financial year commencing 1st of April, and prepare budgets for the following year, in discussion with each IOM Chapter.
- Oversee the maintenance of any agreements made with IOM Chapters, and any other organisations with which IOM International has a *commercial* arrangement (e.g. for the purchase or supply of goods and services) or a *collaboration* arrangement (e.g. with the UK Engineering Council, other institutes, or standards organisations).

3.3.2 Public Relations Policy

The International Board has the responsibility for public relations policy and oversight of related activities to ensure that any exposure in the press, television, radio or any other media actively promotes a positive image and, whenever possible, is coordinated.

The aims of any public relations policy will change with the growth of IOM and shifts in members' interests but will generally promote membership, raise awareness of current issues

and ongoing initiatives, and promote IOM activities and events such as IOM International Conferences, IOM Chapter meetings, and the formation of new IOM Chapters.

3.4 President

The position of President is a statutory appointment.

The period of office aligns with the schedule of the IOM International Conference and will normally be two years. The incoming President takes over from the retiring President at the end of the Conference.

The position is assigned on rotation between the current Chairpersons of the IOM Chapters. The rotation follows the order in which the Chapters were incorporated, unless otherwise agreed.

3.4.1 Role of the President

The President has both an internal role and an external role.

3.4.1.1 Internal

The President chairs meetings of the International Board and takes a leadership role in setting the strategic direction of the Institute and in proposing policies and initiatives. The President has no vote in formal resolutions except when a casting vote is required. The other Officers support the President in fulfilling the role.

The President maintains close communication with the Non-Executives, Secretariat, Working Groups and Committees and monitors the progress of their activities. The President may delegate day-to-day management of certain activities to the Vice-President or another Officer, for example if that Officer is the Chairperson of the relevant Working Group or Committee.

The President retains personal responsibility for organising International Board meetings, the Annual General Meeting (AGM) of IOM International and managing the IOM International Conference. However, they will generally receive substantial support from the Officers, Non-Executives and Secretariat.

If requested, the President is ready to mentor any Officer who may need advice or support.

3.4.1.2 External

The President represents the entire organization and is particularly concerned with taking every opportunity to publicize, promote and develop IOM on the world stage, for example when there is an opportunity to form a new IOM Chapter, or to raise the profile of Obsolescence Management in wider industry, academia or government. Many of these

opportunities involve the President acting as nominated author for articles, presentations, or press releases prepared by the Non-Executives and Secretariat.

3.5 Vice-President

The Board elects a Vice-President who is normally the retiring President, but the International Board may elect another member if this is not possible. The Vice-President passes on their knowledge and experience to the incoming President during the handover, acts as their deputy, and may be given delegated authority for specific responsibilities.

The Vice-President maintains regular contact with the President so that they are ready to represent IOM in the President's absence and deputise when necessary and mutually agreed.

3.6 Non-Executives

From time to time the International Board of Directors may appoint Non-Executive officers to undertake defined roles. These currently comprise the Chief Technical Officer (CTO), Chief Financial Officer (CFO), the Head of Professional Development, and the Head of Standards & Accreditation.

The CTO is a service provider to IOM International. The responsibilities and deliverables are specified in a contract which is subject to negotiation and renewal with the approval of the International Board at agreed intervals. The CTO is also available to undertake similar contracts with IOM Chapters subject to rationalisation of the overall level of resource and funding.

The CFO, Head of Professional Development, and Head of Standards & Accreditation operate on an unpaid basis for the majority of the work they undertake. However, the International Board may offer ad-hoc payments in recognition of time spent on major tasks that extend to many days or weeks. The flexibility to do this is somewhat limited within the available budget.

The Non-Executives may be reimbursed for routine travel and subsistence expenses incurred on IOM business if they are not supported by their employer.

3.6.1 Chief Technical Officer

The CTO provides extensive support to the International Board according to the scope of work defined in their contract. For example, this includes representing IOM International with other institutions and trade associations, preparing articles, presentations, or press releases for the President and delivering them on the President's behalf, developing and maintaining the technical content of the IOM International website, and contributing to the development of membership and new IOM Chapters.

The CTO is responsible for, or supervises, the general maintenance of the IOM International website <https://www.theiom.org> including routine refresh of content and the arrangements

by which Individual and Corporate Members have password protected access to privileged information.

3.6.2 Chief Financial Officer

At the discretion of the International Board, the non-executive role of CFO may be combined with the statutory role of Company Secretary, for example if one person is willing and able to undertake both roles. If the roles are kept separate, the division of responsibilities is by mutual agreement subject to the final approval of the International Board.

The CFO supervises the financial processes at IOM International to ensure adherence to the budgetary decisions of the International Board. The CFO monitors expenditure against budgets and ensures the legal requirements for financial reporting are satisfied. The CFO maintains oversight of day-to-day financial operations and record keeping undertaken by the Secretariat.

The CFO has a central role in forecasting income and expenditure for the next financial year and prepares the necessary financial forecasts and options for the International Board to consider. This involves extensive liaison with the financial officers of each IOM Chapter from which IOM International derives most of its income.

3.6.3 Head of Professional Development

The Head of Professional Development is responsible for supporting Individual Members of all IOM Chapters in advancing their career and gaining recognition for their success, e.g. as an Associate (AIOM), Member (MIOM) or Fellow (FIOM) of IOM, and optionally, as a registrant of the UK Engineering Council as a Technician (EngTech), Incorporated Engineer (IEng) or Chartered Engineer (CEng). Members are entitled to use the appropriate post nominal letters according to their achievements and registration.

In order to sustain IOM's Professional Affiliate status with the Council it is essential to comply with a broad range of requirements and guidelines. The Head of Professional Development leads the work necessary to achieve this and hosts the regular audits conducted by the Council's Quality Assurance Committee (QAC).

The overall scope of work performed by the Head of Professional Development is authorized and supervised by the Professional Standards and Membership Committee.

3.6.4 Head of Standards & Accreditation

The Head of Standards & Accreditation is responsible for coordinating the contributions of Individual Members from all IOM Chapters to the various international standards bodies such as IEC, AFNOR, BIS, BSI, SAE, and VDE. For example, Individual Members of IOM may contribute as convener or participant of a standards committee. The subject of interest could be Obsolescence Management, anti-counterfeit, notice management, DMSMS, or another topic relevant to IOM members' interests.

On behalf of all IOM Chapters, IOM International has particular interest in the continuing development of standard IEC 62402:2019 'Obsolescence Management', which is of strategic importance. The Head of Standards & Accreditation is the convener of the relevant IEC Committee and, on behalf of IOM, has played a key part in driving its evolution from the earlier guideline IEC 62402:2007 to the current standard. There are other activities relating to guidelines and standards where IOM is internationally respected for its major contribution.

A further initiative is under development by IOM International for the benefit of Corporate Members in all IOM Chapters. This aims to establish and operate quality assessment systems that will provide independent assurance of the competency of an organization with respect to IEC 62402:2019. Such accreditations will support processes such as competitive evaluation of alternative suppliers, value-for-money investigations in single source procurement, and the forecasting of technical and financial outcomes for large / complex / long-life systems.

The overall scope of work performed by the Head of Standards & Accreditation is authorized and supervised by the Professional Standards and Membership Committee.

3.7 Secretariat

The Secretariat operates as a service provider to IOM International. Its responsibilities and deliverables are specified in a contract which is subject to negotiation and renewal with the approval of the International Board at agreed intervals. The IOM International Board may request additional services at an agreed hourly rate.

The Secretariat is also available to undertake similar contracts with IOM Chapters subject to rationalisation of the overall level of resource and funding, but for reasons of geography this has generally been limited to the UK Chapter. The other IOM Chapters may choose to make local arrangements for Secretariat functions.

The roles of the Secretariat include:

- Day-to-day processing of routine financial transactions and updates to the financial and management accounts under supervision of the CFO.
- Administration of members' records such as contact details, membership grade, the Obsolescence Management Practitioners' Register, and any Professional Registration with the UK Engineering Council or other registration authorities.
- Support to the President re planning and logistics for the International Conference. To include research into options for venues and costs, liaison with selected venues and providers, and event management including support on the day.

On an occasional basis the President may, on behalf of the International Board, invite guests to join all or part of a Directors' meeting or AGM, for example as an external

auditor, special advisor, or observer. The Secretariat will manage the invitations and logistics. Such invited guests do not have voting rights.

3.8 Working Groups and Committees

Working Groups and Committees are typically led by the President, Vice-President, or a Director of the International Board with delegated responsibility. There is broad flexibility in their constitution and terms of reference. Their membership depends on the task in hand, the desired outcome, and the availability of suitably qualified volunteers.

There are two committees which operate on an ongoing basis. These are the Professional Standards and Membership Committee and the IOM International Conference Committee.

3.8.1 Professional Standards and Membership Committee

The Professional Standards and Membership Committee comprises the Vice-President, the CTO, the Head of Professional Development and the Head of Standards & Accreditation. It is concerned with reviewing and approving proposed initiatives in relation to Professional Development, Standards and Accreditation. It also manages external relations with relevant organizations including IOM Endorsed Trainers, UK Engineering Council, the Foundation for Science & Technology, professional institutions, academic institutions and standards bodies.

The Committee is also responsible for the AllIOM Short Course in Obsolescence Management, and for fulfilling the Engineering Council requirements applicable to Professional Affiliates including the Members' Code of Conduct and Disciplinary Procedure for investigation of misconduct and grievances.

Any contributor to this committee who is not already an Individual Member, or a named delegate of a Corporate Member, is entitled to the grade of Honorary Member through the relevant IOM Chapter. This entitlement acknowledges the personal commitment involved.

3.8.1.1 AllIOM Short Course in OM

The Committee is responsible for content and delivery of the AllIOM Short Course. Students who are successful in the course assessment are eligible for professional membership of IOM at the Associate Member grade.

The Committee appoints Endorsed Trainers to deliver the course on its behalf. Endorsed Trainer status does not extend to other courses that the trainers may offer, but IOM nevertheless encourages development of further courses for the obsolescence management community.

The level of educational attainment achieved by the AllIOM Short Course is aimed at UK National Vocational Qualification Level 3 (NVQ 3) which is technician level. Student assessment is by multiple choice exam and a practical or simulated work-based assessment.

The Committee may, at its own discretion, appoint additional members with specific roles in management and oversight of the AIOM Short Course. These are:

- The *Training Requirements Authority* who maintains the syllabus so that it aligns with the current version of IEC 62402 and takes account of any other learning outcomes specified by the Committee, for example as may be agreed with an IOM Chapter with specific local needs.

This role includes responsibility for coordinating reviews of training course proposals from Endorsed Trainers including training content, means of delivery, and the basis of student assessment.

The role also includes responsibility for devising and operating a suitable audit scheme to provide assurance that training delivery is being achieved to acceptable standards.

- The *Training Delivery Manager* is the nominated point-of-contact between IOM and the Endorsed Trainers and is their first point-of-call for queries at the operational level.

This role includes responsibility for supporting both existing and potential Endorsed Trainers in developing their offer for new IOM Chapters or new regions of the world.

The role also involves working with Endorsed Trainers to develop practical support for students with visual impairment or other special needs, and for ensuring that each Endorsed Trainer makes appropriate provision for students who request such support.

3.8.1.2 *Members' Code of Conduct*

The IOM International Board endorses the Statement of Ethical Principles published by the UK Engineering Council. This is underpinned by the four fundamental principles as stated at <https://www.engc.org.uk/standards-guidance/guidance/statement-of-ethical-principles/>.

These principles underpin the IOM Code of Conduct. The IOM International Board has resolved that the Code of Conduct applies to all Individual Members and named delegates of Corporate Members whether or not they have Professional Registration with the UK Engineering Council. The rationale is that everyone should aspire to the same high standards in their professional life. (Ref Code of Conduct identity 190711).

Individual Members and named delegates of Corporate Members must agree to observe the Code of Conduct. This commitment is implicit in their initial membership application and is reaffirmed at each subscription renewal.

The Code of Conduct does not apply to Corporate Member entities such as public companies, private companies, private partnerships, academic institutions or government departments except for their named delegates. Corporate Members are, however, required to comply with legislation and regulation, recognized ethical standards, and this Members' Handbook.

3.8.1.3 Misconduct and Grievances

Although complaints against Individual or Corporate Members are extremely rare, the Disciplinary Procedure can be invoked if it is not possible to achieve an amicable resolution. (Ref IOM Disciplinary Procedure, identity 190722).

The Chair of the IOM Chapter to which the subject under investigation is affiliated has the delegated authority from IOM International to invoke the procedure. The IOM International Board is notified of the progress and outcome of the case but must not be invited to ratify the finding and any sanction since it has not heard the evidence. However, in the event of any appeal to IOM International, the evidence would be made available.

The Disciplinary Procedure comprises a Preliminary Investigation to determine whether there is a case to answer, and a Disciplinary Investigation to determine whether a breach has occurred and decide sanctions. The Disciplinary Investigation is only invoked if the Preliminary Investigation finds that the subject has a case to answer.

There is no presumption of liability until breach of the Code of Conduct is admitted or proved. Admitted or proved breaches attract sanctions commensurate with their severity and any impact on others. This can include expulsion from the Institution.

3.8.2 International Conference Committee

The International Conference Committee comprises the President, the Vice-President, the CTO, a subset of Directors from the International Board and a representative of the Secretariat. Planning for the next Conference starts as soon as the last has ended. Planning takes account of these terms of reference:

- The IOM International Conference is normally held every two years and is hosted by the IOM Chapter to which the President is affiliated. Planning and delivery is ultimately the responsibility of the President. However, the President generally receives significant support from the hosting Chapter and IOM International.
- All IOM Chapters are required to make every effort to source appropriate papers and to encourage the maximum attendance at the Conference and its associated trade exhibition.
- The working language for the conference is English regardless of where it takes place.

3.9 Development of a New Chapter

The formation of new IOM Chapters typically arises when IOM International identifies that a critical mass of existing or potential members has been reached within a given territory. Alternatively, IOM International may receive an unsolicited proposal. In either case, critical mass is considered to have been achieved when the formation can be resourced, the new Chapter appears to be viable in the near term, and there is potential for growth in the future.

The process is managed at the level of the IOM International Board of Management as follows.

3.9.1 Formation of an Ad-Hoc Committee

Individuals interested in forming a new IOM Chapter are encouraged to form an Ad-Hoc Committee to investigate the possibility and may initially be given limited financial and material support by IOM International. The Ad-Hoc Committee needs to consider (a) the incorporation of a suitable legal entity according to local jurisdiction, (b) the business case (e.g. the potential number of individual and Corporate Members), and (c) the requirements and practicalities for the management and administration of the Chapter and provision of services to members.

3.9.2 Protection of Institution Name & Logos

The trading name "International Institute of Obsolescence Management" and the IOM logos illustrated in this Members' Handbook are owned by IOM International and are legally protected. This protection must be extended to each country and territory in which the new IOM Chapter intends to operate.

The Ad-Hoc Committee must investigate means to protect the proposed name for the legal entity to be incorporated according to local jurisdiction, advise IOM International based on their local knowledge, and then support IOM International in achieving a solution.

3.9.3 Preparation of Delegation Agreement

The Ad-Hoc Committee is asked to review a template of the Delegation Agreement (e.g. an example of one that already exists). The Ad-Hoc Committee and IOM International Board of Management jointly instantiate the template for the new Chapter such that any necessary variations are incorporated (e.g. to accommodate different legislation and regulation) whilst ensuring that the substantive provisions covering members' entitlements and obligations are retained intact (e.g. concerning the IOM Register of Practitioners, their commitment to the Code of Conduct, and processes related to Professional Registration).

3.9.4 Completion of the Development Process

The incorporation of a suitable legal entity for a new Chapter and sign-off of the Delegation Agreement completes the legal process for its development but members of its Council usually continue to receive detailed guidance and support from IOM International until the new Chapter can be sustained from its own resources.

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4 The IOM Chapters

IOM Chapters operate within an agreed territory which may cover one or more countries in one region of the world. Both Individual and Corporate Members may choose to apply to join any Chapter, for example based on their location or natural language. If they have no preference IOM suggests they apply to the UK Chapter by default as this provides some activities for overseas members.

Each IOM Chapter is encouraged to promote membership in countries which are not, as yet, included in the agreed territory of an existing Chapter. Some suggestions to consider are: -

- IOM France (IFO) to promote membership in French speaking countries.
- IOM Germany (COGD) to promote membership in German speaking countries.
- IOM India to promote membership in the subcontinent, e.g. Pakistan, Bangladesh, Nepal, Bhutan and Sri Lanka.
- IOM USA to promote membership in North America, e.g. Canada and Mexico.

Each Chapter is governed by an elected Council who are appointed as Directors or other officers of the legal entity consistent with the jurisdiction of the country in which they are incorporated. The Council is led by an elected Chairperson. Other roles necessary for the development of a Chapter are agreed locally and are described in a Chapter specific appendix to this Handbook.

Income within the Chapter comes from members' subscriptions and corporate sponsorship for events and websites. On an annual basis there is a negotiation to agree the proportion of income that will be contributed by the Chapter to IOM International. IOM International uses this income to underwrite any losses arising from the International Conference and fund central services, external relations, and subsidies to new Chapters during formation and development.

The Chapter Council has the responsibility to set overall objectives that ensure the Chapter remains sustainable in the long term while delivering the best possible value to its Individual and Corporate Members. Strategic priorities may vary between Chapters depending on their stage of development and local conditions but are likely to include:

- Responsibility for good governance and leadership of the Chapter. Any significant variation from the general approach to governance and leadership adopted by IOM International is described in the Annex to this handbook.
- Examining and setting of new initiatives to take the Chapter forward. This may involve co-ordination with IOM International.

- Delivering a minimum number of activities during the financial year such as members' meetings, workshops, and exhibitions. Each Chapter Council manages these activities according to its own members' interests but welcomes members from other Chapters to participate. Managing the activities involves forecasting the level of attendance, ensuring that they can be funded, administration and logistics, and review of members' feedback.
- Retaining and growing membership numbers to maintain income and services.
- Attracting corporate sponsorship for events, websites and other opportunities.

Each Chapter is free to co-ordinate the activities in their territory and to decide policy within the overall framework established by their Delegation Agreement. The Chapter Council must follow the mandatory requirements contained in their Agreement and must observe the regulations and guidance in this Handbook.

4.1 Election of Council

The Directors of an IOM Chapter Council comprise members of the Chapter elected by the members by simple majority. The term of office is usually three years. Nominations are sought from and by the members for each position available.

Individual Members of the Chapter have one vote each. The Chapter Council defines the voting entitlement for Corporate Members. There is no entitlement to vote if the members' subscription has lapsed. The entitlement to vote may be withdrawn as part of any disciplinary sanction.

4.2 Members' Meetings

4.2.1 Objectives

Members' meetings are considered to be a major part of the value proposition for members.

Each IOM Chapter arranges members' meetings for the benefit of its individual and corporate members, guests from other Chapters, and invited guests. The tradition is that there should be three or four meetings spread throughout the financial year, but this is a recommendation and not a fixed requirement. The choice of dates may need to avoid a clash with other events which are likely to be of interest to members including the IOM International Conference.

The objectives are to offer presentations and workshops on the science and practice of Obsolescence Management and to report on the activities of IOM International, the IOM Chapter itself, and the Working Groups and Committees. It is also useful for members to be briefed on any changes in the regulatory environment in which they operate, e.g. REACH, RoHS, WEEE directive, and conflict minerals regulations.

4.2.2 Management

The Chapter is responsible for funding, planning and logistics from its own resources.

Funding is often covered by sponsorship from one of the Corporate Members. Each IOM Chapter has discretion to decide its policy on whether to allow non-members to sponsor members' meetings and on what terms. Planning includes research into options for venues, setting the agenda, and finding speakers, exhibitors and contributors. Logistics is concerned with administration of attendees and liaison with the selected venue and service providers including support on the day.

4.2.3 Delegate Lists

The Chapter should encourage Individual Members to explicitly 'opt-in' to sharing their name, organization, and email address on the published delegate list. For example, a suitable GDPR statement and check-box could be included on the registration web page for the meeting. Personal details must not be included in the list unless an opt-in is on record.

All members, including the sponsors for the meeting, are permitted to use the contact details on the delegate list to maintain contact with others, e.g. to fulfill explicit requests for further information, or to pursue initial contacts established during networking. Members must not use delegate lists to send general mail-shots and must not forward details to third-parties.

4.2.4 Presentations

Presentations should address a range of subjects that, taken together, result in a balanced agenda which is likely to contain something of interest for the majority of the audience. An exception to this would be themed meeting on a specific subject, for example this may be arranged as a special event.

Presentations should generally avoid any overt commercial content although supplier specific presentations are welcomed if they are particularly relevant to the subject under discussion. The exception to this guideline is that if the meeting is sponsored, the sponsor can make a commercial presentation.

Presentations will be usually be uploaded onto the IOM Chapter's website subject to any restrictions the presenter specifies concerning protected content (e.g. copyright, intellectual property, ITAR regulations) or data protection (e.g. the presenter's personal information). If the presentation appears to include third-party content (e.g. photos, videos, drawings, source code) the IOM Chapter should ask the presenter to confirm that they have rights to use it for the purpose of the presentation.

4.2.5 Participation

Significant levels of interaction are encouraged by the inclusion of items such as:

- Q & A sessions after each presentation.
- One or more discussion groups sessions.
- Q & A panels covering a specific topic of major interest.

4.2.6 Feedback

At the close of each meeting attendees should be encouraged to complete a questionnaire to record their rating of each presentation and activity. The questionnaire should invite further suggestions and comments so as to obtain detailed feedback. The questionnaires should be analyzed before planning the next meeting, e.g. at the next Chapter Council.

4.3 Individual Membership

4.3.1 General Arrangements

The concept of Individual Membership was introduced during the transition from our legacy trade organization to professional institution. The purpose of Individual Membership is to:

- Improve standards of professionalism.
- Help individuals with Initial Professional Development (IPD), Continuing Professional Development (CPD), and routes to Professional Registration.
- Achieve recognition for the achievements of individuals at national and international level to enable career progression and worldwide mobility.

IOM International has defined membership grades on a similar basis to the majority of the professional engineering institutions licensed by the UK Engineering Council including the Institution of Engineering Technology (IET) with which IOM is negotiating an Alliance.

IOM has established criteria for admission to each grade similar to those established by the IET. The IET criteria are recognized by the Engineering Council. Both the UK Engineering Council and IET have global reach and are well placed to support the Professional Development of Individual Members in all IOM Chapters.

Each IOM Chapter has discretion to decide the subscription for each grade and when this becomes due, for example whether on a fixed annual calendar or on the anniversary of the date of first joining. However, subscription rates should be set at a similar level to those of other Chapters in the region to avoid competition between Chapters for members. This information is given in the Annex to this Handbook.

Income from all grades of Individual Membership shall be included in the calculation of annual payments by each IOM Chapter to IOM International.

4.3.2 Affiliate Member

This is the default grade for new members, for former members of COG, and those with an interest in obsolescence management who are not necessarily employed as practitioners. It is also for those, including students and apprentices, who are working on their Professional Development and are preparing to apply for transfer to Associate, Member or Fellow grade.

4.3.3 Associate Member (AllIOM)

The AllIOM grade broadly equates to “technician” level. The criteria for AllIOM is based on applicants having passed the “Short Course in Obsolescence Management at AllIOM Associate Grade” which is available from providers assessed under the IOM Endorsed Trainer scheme. This is generally known as the “AllIOM Short Course”.

4.3.3.1 The AllIOM Short Course

IOM International has responsibility for the ongoing review and update of the syllabus of the AllIOM Short Course against the evolving standards and latest best practice. There is particular emphasis on ensuring close alignment with IEC 62402:2019 “Obsolescence Management”.

Students who successfully complete the AllIOM Short Course receive a Pass Certificate from their Endorsed Trainer. The Endorsed Trainers give a list of students and pass / fail outcomes to the IOM International Secretariat on completion of each course. The Secretariat uses this data to maintain aggregated training statistics for IOM and the UK Engineering Council, and for verification of AllIOM applications.

NOTE: The IOM International Secretariat is subject to UK jurisdiction. To ensure compliance with the UK General Data Protection Regulation (GDPR), tailored by the Data Protection Act 2018, Endorsed Trainers are required to ask students for permission to share their full name and date of course with the Secretariat.

4.3.3.2 AllIOM Application Process

The IOM International Secretariat has delegated authority from the Professional Standards and Membership Committee to process AllIOM applications. However, the Committee maintains oversight and reserves the right to review and confirm membership decisions.

Applicants with a Pass Certificate may apply for Associate Membership of IOM (AllIOM) by sending an email to the IOM International Secretariat at admin@theiom.org. Applicants should state whether they are applying as a named delegate of a Corporate Member or as an Individual Member. Membership rights and responsibilities are the same in either case.

The Secretariat will either confirm the status of named delegates with their organization or will collect the fees from Individual Members. If the applicant is successful, the Secretariat issues an AllIOM Membership Certificate and adds them to the IOM Register of Practitioners.

NOTE: It is not possible for Corporate Members to apply on behalf of their named delegates. Each AIOM applicant must apply on their own behalf because, in doing so, they individually confirm their commitment to comply with the Members' Handbook and Code of Conduct.

4.3.3.3 AIOM Post Nominal Letters

Associate Members have a legal entitlement to use the post nominal letters "AIOM" as soon as they receive their AIOM Membership Certificate from the IIOM International Secretariat. This right continues for as long as:

- They either remain a named delegate of a Corporate Member or, if they are an Individual Member, they keep their annual AIOM subscription renewal up-to-date;
- Their membership of IIOM and/or status as an Associate Member has not been suspended or withdrawn as the result of a sanction arising from disciplinary action.

NOTE: Successfully completing the AIOM Short Course does not, in itself, give an individual the right to use the AIOM post nominal letters.

4.3.4 Member and Fellow (MIIOM and FIIOM)

The Member (MIIOM) grade is typically awarded to those working at or above graduate level, however if you do not have a qualification at graduate level this is not necessarily a barrier. In this situation you may need to provide more information to show that you have equivalent learning, e.g. as acquired through experience.

MIIOM applicants will need to provide details of their role in industry, academia, government or military. This may include roles specific to the practice of obsolescence management and adjacent areas of work such as engineering, technology, commerce, standards, teaching, training, inspecting, certifying or managing.

The Fellow (FIIOM) grade is awarded to those who can demonstrate superior achievement(s) in roles involving substantial responsibility in obsolescence management or related disciplines relevant to IIOM, usually within the last 10 years.

FIIOM applicants will need to provide evidence of their specific personal contributions, achievements, and resulting impacts in criteria such as creativity, enterprise, innovation, insight & experience, leadership, reputation, responsibility, service, and influence & contribution.

4.3.4.1 MIIOM and FIIOM Application Process

From the 1st April 2021, IIOM International opened the application process for MIIOM and FIIOM grades.

Applications are welcome from both existing members of IIOM and non-members. The criteria and process are approved by the IIOM International Board and kept under review by

the UK Engineering Council, for example during reviews of IOM's Professional Affiliate status undertaken by the Council's Quality Assurance Committee (QAC).

- The MIIOM and FIIOM application process is managed by the Professional Standards and Membership Committee under the authority of the IOM International Board. Administrative of the process is delegated to the IOM International Secretariat.
- As with many professional engineering institutions, the criteria for MIIOM and FIIOM grades do not involve passing an examination. They are based on an assessment of education, training, experience and the support of people who know you.
- The criterial are set out in the applicant's guides. These guides, together with the forms to be used by the applicants and their supporters, may be downloaded from the IOM International website in MS Word and PDF format. The MS Word format allows the applicant and supporters to edit and save the information requested.

MIIOM Membership

Ref 200709: MIIOM Supporter's Form	Word	PDF
Ref 200710: MIIOM Application Form	Word	PDF
Ref 200713: MIIOM Applicant's Guide	Word	PDF

FIIOM Membership

Ref 200711: FIIOM Supporter's Form	Word	PDF
Ref 200712: FIIOM Application Form	Word	PDF
Ref 200714: FIIOM Applicant's Guide	Word	PDF

- The applicant is responsible for identifying suitable supporters, enlisting supporters' co-operation in completing the forms, and ensuring they are ready to be submitted.
- The applicant should send their application form and supporter(s) forms by email to the IOM International Secretariat admin@theiom.org The Secretariat will check that the forms are complete and supporting evidence has been provided, e.g. certificates.
- The Secretariat will collect the appropriate application fee. The fee has been made non-refundable to discourage speculative applications and ensure that processing costs are covered.
- An MIIOM or FIIOM application will be considered by a sub-committee which comprises standing members of the Professional Standards and Membership Committee and at least one member of Council for the IOM Chapter to which the applicant is already, or would like to be, affiliated.

- The sub-committee holds an online meeting on a monthly basis. At least one week before each meeting the Secretariat distributes copies of applications received since the previous meeting.
- The Secretariat attends the meeting to record the decision and rationale for each application.
- Following the meeting the Secretariat prepares pro-forma letters to applicants to advise them of the decision. In the case of successful candidates this will include an invoice for their first subscription. In the case of unsuccessful candidates, the letter includes the key reasons for the decision, information on the right to appeal, and advice on who to contact for further advice. All letters are reviewed and signed by the Chair of the Professional Standards and Membership Committee.
- Following receipt of the applicant's MIIOM or FIIOM subscription the Secretariat adds them to the IIOm Register of Practitioners. The Secretariat prepares the MIIOM or FIIOM Membership Certificate and sends this to the applicant.

4.3.4.2 MIIOM and FIIOM Post Nominal Letters

Members and Fellows have a legal entitlement to use the post nominal letters "MIIOM" or "FIIOM" as soon as they receive the corresponding Membership Certificate from the IIOm International Secretariat. This right continues for as long as:

- They either remain a named delegate of a Corporate Member or, if they are an Individual Member, they keep their MIIOM or FIIOM subscription renewal up-to-date;
- Their membership of IIOm and/or status as a Member or Fellow has not been suspended or withdrawn as the result of a sanction arising from disciplinary action.

4.3.5 Honorary Member

IIOm Chapters may, at their own discretion, offer an Honorary Membership when there is a wish to retain access to the knowledge, experience and influence of a valued contributor who has retired from full employment as a practitioner. This decision requires a secret vote of the Chapter Council and must be unanimous. The duration of Honorary Membership is two years but may be renewed by the Chapter Council if considered appropriate.

Honorary Members have the following entitlements:

- Subscription fees due are waived.
- They may attend IIOm Chapter meetings and events free of charge.
- They may be reimbursed by the IIOm Chapter to which they are affiliated for the cost of attending the IIOm International Conference if not supported by their employer.

The usual practice is that this agreed in advance with the Chapter Council, for example in recognition of the Honorary Member making a contribution to the organization and delivery of the Conference.

- They may be reimbursed by IOM International or the IOM Chapter to which they are affiliated (as appropriate) for routine travel and subsistence expenses incurred while on approved IOM business if not supported by their employer. For major projects such as support to new Chapter formation, or overseas meetings of standards committees, the usual practice is that the likely expenses are reviewed in advance and a suitable budget is agreed.
- They may continue to use their post nominal letters, e.g. AIIOM, MIIOM or FIIOM. There is no entitlement to specific post nominal letters for Honorary Membership.
- They have the right to resign at any time.

4.3.6 Reduced Subscriptions

IOM Chapters may, at their own discretion, offer reduced annual subscriptions to Individual Members at Affiliate, AIIOM, MIIOM and FIIOM grades based on age, employment status or other criteria. This concession is not relevant to Honorary Members or named delegates of Corporate Members.

If reduced subscriptions are available from your IOM Chapter further details of entitlements and conditions will be specified in the Annex to this Handbook.

4.3.7 Professional Registration

Professional Registration has benefits for employers, engineers and the economy.

- Employers have the assurance of knowing that their engineers have received education and training that has enabled them to gain the recognition of their peers as meeting recognized standards for knowledge and experience. Their credentials have been verified.
- Professional engineers and technicians who register benefit from the achievement and self-esteem of meeting recognized standards for knowledge and experience. Whether specified in job advertisements or not, registration as a professional gives an edge to candidates who have it.
- The economy benefits because the registration of engineers and technicians encourages them to undertake additional study and experience to maintain their employability, and to ensure their flexibility in the face of changing circumstances. This aids economic development, and employment flexibility.

The UK Engineering Council publishes an annual 'Pocket Guide to Registration'. This provides key information about Professional Registration and explains the relationship between the many organisations working within the professional engineering community. It also includes profiles of all the licenced and affiliated professional engineering institutions including IOM.

4.3.7.1 General Arrangements for all IOM Chapters

The option to apply for Professional Registration with the UK Engineering Council is available to anyone who is able to demonstrate that they have achieved the relevant competencies, regardless of nationality or location. It is a strategic objective that IOM should facilitate this process as a benefit to Individual Members of all IOM Chapters.

The competencies are defined at Engineering Technician (EngTech), Incorporated Engineer (IEng) and Chartered Engineer (CEng) level in the UK Standard for Engineering Competence, please see <https://www.engc.org.uk/ukspec4th>. This standard is globally recognised and enables the international mobility of engineering professionals.

The UK Engineering Council delegates the registration process to Professional Engineering Institutions (PEIs) licensed by the Council. IOM International is negotiating an Alliance with the largest of these, the Institute of Engineering & Technology (IET) <https://www.theiet.org>, with which IOM shares many strategic objectives such as growing their membership throughout the world. The IET has offices in the UK (serving the EU), China, Hong Kong, India and the USA.

Work is in progress to provide all Individual Members with the option to access the IET's online process for achieving and maintaining Professional Registration via a simple portal from the IOM International website.

4.3.7.2 Arrangements for Specific IOM Chapters

Each IOM Chapter is free to establish alternative arrangements for Professional Registration with an authority other than the UK Engineering Council, e.g. where this would be more appropriate or preferable for members in their territory. In this case the Council of the IOM Chapter will describe the general arrangements in the corresponding Annex to this Handbook.

4.3.8 Professional Development

Professional Development is the acquisition of knowledge and skills and the development of personal qualities. It plays a crucial part in achieving and maintaining your expertise in obsolescence management and wider engineering competence.

Professional Development generally takes place in a working environment and draws on knowledge and understanding, training and experience. However, it is not necessarily separate from education and the two processes may be integrated, for example in work-based degrees or apprenticeships organized by your employer.

There is sometimes a degree of confusion over the terminology associated with Professional Development. In the IOM Members' Handbook we refer to Initial Professional Development (IPD) and Continuing Professional Development (CPD) as defined by the Engineering Council.

4.3.8.1 Initial Professional Development (IPD)

IPD refers to the workplace development that takes place prior to Professional Registration as EngTech, IEng or CEng.

This is when aspiring professionals learn to apply their knowledge and understanding, develop their skills and competence, and begin to apply professional judgement. IPD enables engineers and technicians to demonstrate the necessary competence and commitment to become registered with the Engineering Council.

Many Individual Members of IOM carry out their IPD through structured programs such as a technician apprenticeship, graduate training scheme, or post-graduate mastership. These employer schemes may be accredited or approved by one or more of the Professional Engineering Institutions. This means that the program objectives align with the standards for Professional Registration. It also means that any Professional Development that takes place during the program will be recorded, which is crucial for demonstrating competence at professional review.

In its capacity as a Professional Affiliate of the UK Engineering Council, as opposed to a Professional Engineering Institution, IOM International has not yet accredited or approved any employer schemes for IPD. There may be scope for establishing such schemes in the future, for example as part of the proposed Alliance between IOM and the IET.

In the meantime, IOM International does support IPD for Individual Members of IOM at technician level (AllIOM and EngTech) through the Endorsed Trainer Scheme and AllIOM Short Course.

The Engineering Council provides guidance on IPD at <https://www.engc.org.uk/professional-development/initial-professional-development-ipd> including a link to a YouTube video and IPD Policy Statement.

4.3.8.2 Continuing Professional development (CPD)

CPD refers to the commitment made by those who have Professional Registration as EngTech, IEng or CEng to maintain and enhance their competence.

CPD has several purposes, which will vary in relation to your circumstances, needs and career progression. It can also take a variety of forms. At its heart is informal learning through the challenges and opportunities of working life, and interaction with others such as colleagues, customers and suppliers, including professionals from other disciplines. This may be supplemented by structured activities such as courses, distance learning programmes, private study, preparation of papers and presentations, mentoring, involvement in professional body

activities, or relevant voluntary work. This list is not exhaustive, and each individuals will be best placed to determine their own needs and how to meet them.

Individual Members of IIOM who have Professional Registration will have initially applied for this, and subsequently maintained it, through the IET or another Professional Engineering Institutions. Most institutions provide online guidelines, resources and systems to enable registrants to plan their CPD activities and maintain a fair record. Many employers encourage their employees to plan CPD activities that will support their agreed development objectives in the workplace.

Anyone who persistently fails to respond to requests for CPD records risks removal from the Engineering Council Register.

In addition, it is the policy of IIOM to

- Encourage all Individual Members on the IIOM Register of Practitioners (i.e. those in AIOM, MIIOM and FIIOM grades) to undertake CPD even when they do not have Professional Registration as EngTech, IEng or CEng. IIOM does not provide resources or systems to enable this, and does not audit members' CPD records, but members are strongly encouraged to cultivate the CPD habit and keep basic records as this will stand them in good stead if they apply for Professional registration at a later date.
- Record attendance at all meetings and events, both at IIOM Chapter level and at the IIOM International Conference, such that a CPD record is created for each attendee. Each attendee is also encouraged to complete a feedback form including their reflection on individual presentations, workshops and activities.

The Engineering Council provides guidance on CPD at <https://www.engc.org.uk/professional-development/continuing-professional-development-cpd> including a link to a YouTube video, CPD Policy Statement, and CPD Code for Registrants.

4.4 Corporate Membership

4.4.1 General Arrangements

The concept of Corporate Membership was originally developed by our legacy organization (COG) and remains a core element of the strategy for future development of IIOM. It is of vital importance to Individual Members that they can establish and sustain interactions with Corporate Members and get rapid access to the latest knowledge, information, techniques and practical solutions necessary to solve real-life challenges in Obsolescence Management.

Each Corporate Membership is based on a specified location, for example a company site, university campus, or government office. This ensures that IIOM International and the local IIOM Chapter are funded in proportion to the number of sites where staff use IIOM services.

Each IOM Chapter has discretion to decide the following and this information is given in the Annex to this Handbook:

- The number of staff from each site that may attend meeting and events, and whether anyone from the site can act as a delegate or delegates must be identified by name.
- The subscription for Corporate Membership and when this becomes due, for example whether on a fixed annual calendar or on the anniversary of the date of first joining.

The voting right for a Corporate Member are based on the number of staff from each site that may attend meetings and events. For example, if the IOM Chapter decides that the number of staff is two then the voting right is also two.

Income from all Corporate Membership subscriptions shall be included in the calculation of annual payments by each IOM Chapter to IOM International.

4.4.2 Delegates' Entitlements

All corporate delegates generally have the same entitlement as Individual Members in the Affiliate grade with the exception that they do not have an additional vote to the one they have on behalf of their organization.

Named corporate delegates have additional entitlements to apply for transfer to Associate, Member or Fellow grade so that they can take advantage of the opportunities for Professional Development and personal recognition. In this case there are no additional fees, however if they cease to be a named corporate delegate they must apply for Individual Membership if they wish to retain these entitlements.

Named corporate delegates must agree to abide by the Members' Code of Conduct in their personal capacity.

4.5 Appeals procedure

The criteria for admitting new Individual and Corporate Members or transferring between grades of membership are decided by the IOM International Board. The Board aims to comply with best practice, legislation and regulation in equality, diversity, and non-discrimination.

However, any individual or organisation whose application for initial membership or transfer has been declined is entitled to appeal and ask for a formal review of the decision. If you would like to invoke the Appeals Procedure, please email admin@theiom.org.

4.6 Overdue Renewals

Individual and Corporate Members are required to make payment for the annual renewal of their subscription to their IOM Chapter within 30 days of the due date. Failure to comply may result in the automatic cancellation of membership. Those who wish apply to rejoin at a

later date must follow the same process and pay the same fees as those applying for the first time.

5 International Newsletter

5.1 Submitting Articles

Individual and Corporate Members are encouraged to submit news articles for publication in the IOM International Newsletter. The decision as to which articles are published rests with the Editor.

Articles should be sent by email to admin@theiom.org. The guidelines are that they should be provided electronically in Microsoft Word file format and should not exceed 180 words unless otherwise agreed. If you would like your company logo and/or a small image included in the article, please provide these electronically in JPG or PNG file format.

5.1.1 Submissions from Individual Members

Individual Members may submit articles about technical innovations, progress with academic research, contributions to standards activities, public awards and recognition, or personal success in their Professional Development.

5.1.2 Submissions from Corporate Members

Submissions from Corporate Members are restricted to one for each corporate site. The general guidelines are:

- New Corporate Members can have one article (1/3 A4 page) to describe their business when they first join.
- Meeting sponsors can have one article (1/4 A4 page) promoting their business in the issue just before or after a members' meeting.
- Conference sponsors can have one article (1/4 A4 page) promoting their business in the issue just before or after the conference (as well as in the conference handout).
- Any other article submitted by Corporate Members must comprise news, which could include staff appointments, company acquisitions, new product/services and other items that are not sales and marketing pitches.

5.2 Opportunity to Advertise

We are pleased to offer Corporate Members the opportunity to advertise in the Newsletter. The cost is £200 for an A5 landscape advert. You would need to provide this in JPG or PNG

file format. If this opportunity is of interest, please email admin@theiiom.org. Individual Members are not entitled to promote their business through advertising.

News articles and adverts are clearly differentiated in the Newsletter.

5.3 Inappropriate Advertising

Consistent with other professional institutions, the culture within IOM is that of mutual self-help through which members are encouraged to openly help each other in overcoming the challenges of obsolescence.

With the exception of situations described above advertising or promotional activity is not permitted and may result in a request from the IOM International or local IOM Chapter for its immediate removal. Such advertising or promotion is perceived as inappropriate for a professional institution and is considered to be against the general interest of members.

6 Rules for use of IOM Logos

6.1 IOM Corporate Logo

The IOM Corporate logo is owned by IOM International and is trademarked. Each IOM Chapter inherits the right to use of this logo through their Delegation Agreement. IOM International allows the use of the logo by each IOM Chapter in their own territories for the purposes described in the Agreement.



6.2 IOM Member Logo

Individual and Corporate Members of any IOM Chapter members are entitled to use the IOM Members' logo on their stationery, collateral material and online content.



This right is withdrawn if the membership subscription is not renewed. It may also be withdrawn as part of a sanction imposed following investigation of a disciplinary complaint such as a violation against the Code of Conduct. In this event the logo must be deleted from all stationery, collateral material, and online content. Any remaining stocks of stationery and collateral material must be destroyed.

6.3 Endorsed Trainer Logo

Corporate Members of IOM who act as training providers and hold Endorsed Trainer status in respect of one (or more) courses accredited by IOM may use the Endorsed Trainer logo, for



example on their training materials, marketing materials, web sites, and pass certificates.

This right will be withdrawn in the event of failure to comply with the terms and conditions of the Endorsed Trainer scheme, failure to comply with corrective actions arising from a quality assurance audit, or when the membership subscription is not renewed. It may also be withdrawn as part of a sanction imposed following investigation of a disciplinary complaint such as violation against the Code of Conduct. In this event the logo must be deleted from all stationery, collateral material, and online content. Any remaining stocks of stationery and collateral material must be destroyed.

6.4 Unauthorized use after Termination of Entitlement

The unauthorized use of any IIOM logo may, at the discretion of the IIOM International Board, result in sanctions including withdrawal of the member's entitlements or cancellation of IIOM membership.

7 Internet Domains

IIOM International is the registered owner of the domain name theiiom.org. This is combined with other information to form the Universal Resource Locator (URL) <https://theiiom.org> that directs your browser to the home page.

Each IIOM Chapter agrees an official sub-domain name with IIOM International. This takes the form [\[country-or-region\].theiiom.org](https://[country-or-region].theiiom.org) where [country-or-region] is typically a single country or a geographical region. The advantage of this approach is that a regular pattern is maintained and, from the IIOM Chapters' viewpoint, IIOM International covers administration and costs centrally. For example:

- uk.theiiom.org
- germany.theiiom.org
- benelux.theiiom.org
- dach.theiiom.org

Each IIOM Chapter may have multiple sub-domains, free of charge, if they follow this pattern.

IIOM Chapters may register domains or sub-domains outside of this pattern but will need to cover the admin and costs from their own resources. In this case the Chapter should request IIOM International to redirect the agreed official sub-domain name to one of their own domains or sub-domains.

NOTE: As of the date of publication of the International Members' Handbook Edition 5 the IIOM International and UK Chapter websites are combined. This is a legacy situation which is being resolved.

8 IOM Privacy Policy

IOM is committed to ensuring that your privacy is protected.

This privacy policy explains how IOM International uses the information we collect about you, how you can instruct us if you prefer to limit the use of that information, and procedures that we have in place to safeguard your privacy. The IOM Chapters generally follow this policy, however any variations that may be required by applicable legislation and regulation will be specified in the Annex to this Handbook.

8.1 About Us

IOM is a member-based 'not-for-profit' international institution which aims to promote the best interests of its members and to improve and disseminate knowledge and techniques used in Obsolescence Management.

To enable us to achieve this we hold information about our members to manage their membership applications and renewals, provide benefits and services, support you in your initial and continuing Professional Development, and keep you informed of IOM International and IOM Chapter developments. By providing us with your personal information, including through use of IOM International and IOM Chapter websites, you are agreeing to this policy.

8.2 Staying in Touch

When members and others contact IOM International or an IOM Chapter we may collect and retain personal information including your title, name, postal address, email address, and fixed and mobile phone numbers. For example, this may arise when you enquire about IOM membership or express interest in attending an IOM event.

8.3 Membership Records

We gather information to allow us to process your membership application and renewal and maintain a record of which IOM Chapter you are associated with, your membership grade, your entry in the Obsolescence Management Practitioners' Register if you are an Associate (AIOM), Member (MIOM) or Fellow (FIOM), and whether you have Professional Registration such as with the UK Engineering Council as a Technical (EngTech), Incorporated Engineer (IEng) or Chartered Engineer (CEng). We also keep a record of your place of work and job title.

We may use this to keep you informed about events which we think may be of interest to you such as members' meetings, and to send an International Newsletter on a nominally quarterly basis.

If you become a member of an IOM Working Group or Committee your association with this will be recorded. Your contact details may be seen by other members who are also involved in

Working Group or Committee activities. If you represent IOM International or an IOM Chapter with external bodies, we may keep a record of this association.

If you use a username and password to access privileged information and resources on the IOM International website these will be stored securely on the relevant web hosting servers. Please be aware of the standard advice not reuse the same password for multiple online accounts. You should ensure passwords are of adequate strength and change them regularly.

8.4 Attending Events

When you register to attend an event, whether as a member, guest or sponsor, we will use the contact information we have collected to keep you informed of updates to the agenda and logistics for the event. During or after the event we may contact you to ask for feedback. The feedback you provide may be anonymized before being used for statistical analysis when planning future events.

With the permission of the presenter concerned, presentations given at IOM events are uploaded to the IOM websites. The presenter's personal information such as contact details and/or specific content in the presentation can be withheld from the version uploaded if requested. Presentations can be removed from the websites at a later date if requested.

Photographs may be taken at IOM events and these may be used on the IOM website or within IOM publications. You will be notified in advance so that you have the opportunity to request that your image is not used.

8.5 Service Providers

IOM works with businesses that support our website and other business systems. Although these companies are not usually identified in our literature their details can be provided if you have any concerns about the transfer of your personal information from IOM International or IOM Chapters to third parties.

All of our services providers that have access to, and are associated with, the processing of your personal information are obliged to respect its confidentiality, e.g. through the terms of and conditions of their contracts.

8.6 Links to other Websites

IOM websites contains links to other websites of interest. However, if you use these links to leave our site, you should note that we do not have any control over external websites. Therefore, we cannot be responsible for the protection and privacy of any information which you provide whilst visiting such sites and such sites are not governed by this Privacy Policy. You should exercise caution and look at the privacy policy for the website in question.

The Internet is not a secure medium. Please be aware that messages and transactions sent over the Internet may not be secure, and that they may be routed through a number of countries before being delivered. IOM cannot accept responsibility for the loss of personal information or fraudulent activity in circumstances outside its control.

8.7 Updating your Personal Information

If any of the information that you have provided to IOM needs to be updated, for example you have changed your contact details or would like to restrict the way your information is used, please let us know by sending an email to admin@theiom.org.

8.8 How Long we Keep Your Information

If you resign/withdraw your membership your details are kept on file for two years. After that period your details are deleted.

8.9 Consent

By giving us your personal information, you consent to us collecting and using that information in the ways that we describe in this Privacy Policy and / or in other circumstances where you have given explicit consent. We will always ensure that you are as fully informed as possible as to what we will do with your information, with whom it may be shared, and how long we will keep it. This is in line with the requirements of the relevant legislation. You can alter your preferences or withdraw your consent at any time.

8.10 For Further Information

For further information about data protection and privacy, or to make any requests concerning your personal information please send an email to admin@theiom.org us or write to us at:

International Institute of Obsolescence Management
Unit 3, Curo Park, Frogmore, St Albans, Herts, AL2 2DD UK

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Annex to the Members' Handbook - UK Chapter

Issued under the authority of the IOM UK Council

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Change Record

Edition 4	June 2020
Edition 5	March 2021, incorporating changes and additions officially approved by Council of the IOM United Kingdom Chapter

Referenced Documents

The ruling issue of each document referenced from the UK Annex to the Members' Handbook can be found on the UK Chapter website at <http://www.theiom.org>

Invitation to Comment

IOM is a dynamic organization which continues to develop and expand rapidly owing to the growing global interest in the challenge of obsolescence. As a result, the UK Annex to the Members' Handbook may sometimes be slightly out-of-date or may not cover a topic that would be helpful. If you would like to request changes or additions for inclusion in the next edition, please let us know by sending an email to the IOM UK Chapter Secretariat at admin@theiom.org.

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1 Purpose of this Annex

The IIOM UK Chapter generally inherits the regulations and guidelines of IIOM International through the Delegation Agreement, Members' Handbook, and referenced policies and procedures. The purpose of this Annex is to specify the additional regulations and guidelines of the UK Chapter where there is discretion for these to be decided locally.

Individual and Corporate Members must comply with the regulations of IIOM International as given in the Members' Handbook and those given in this Annex.

The Secretariat of the UK Chapter is responsible for issuing the Handbook and Annex to new members and ensuring that it is available on the Chapter website.

2 IIOM UK Chapter

2.1 Legal Status

Each IIOM Chapter has discretion to incorporate a suitable legal entity according to local jurisdiction. The legal entity for the IIOM UK Chapter is IIOM UK Ltd.

IIOM UK Ltd is registered in England and Wales as a private company limited by guarantee and the Company Registration Number is 09679717. The Articles of Association are available from Companies House, <https://www.gov.uk/government/organisations/companies-house>. The Articles of Association define the legal identity and legal reporting requirements and list the current and resigned Directors.

IIOM UK Ltd has a legal relationship with IIOM International through a Delegation Agreement.

2.2 Officers

The governance of the UK Chapter is the responsibility of the UK Chapter Council. The roles on the Council are typically fulfilled by about six Directors and the Company Secretary of IIOM UK Ltd. The Officers have joint responsibility for governance similarly to the Officers at IIOM International level.

The Officers are unpaid but may be reimbursed for routine travel and subsistence expenses incurred on regular IIOM business if they are not supported by their employer. For major projects the usual practice is that the likely expenses are reviewed in advance and a suitable budget is agreed.

2.2.1 Legal Responsibilities

The Officers have the legal responsibility to ensure that the UK Chapter conforms with local legislation and regulation, and to ensure that the UK Chapter remains solvent and does not

commit any financial irregularities. To comply with these requirements, the Officers are required to:

- Maintain oversight of UK Chapter Non-Executives, Secretariat, Working Groups, and Committees. Where necessary, to question and cause to be overturned any decision made by any party within the UK Chapter which in any way jeopardises the organisation, results in it operating outside the law, causes financial irregularities, or gives rise to reputational damage.
- Maintain oversight of expenditure against authorised budgets during the current financial year, and prepare budgets for the next financial year in discussion with IOM International.
- Oversee the maintenance of the any agreements made with IOM International and any other organisations with which the UK Chapter has a *commercial* arrangement (e.g. for the purchase or supply of goods and services) or a *collaboration* arrangement (e.g. with the UK Engineering Council, other institutes, or standards organisations).
- In addition to the above, the Company Secretary has statutory duties to Companies House and Her Majesty's Revenue & Customs (HMRC), e.g. in respect of the annual return, annual accounts, tax returns, and payment of tax liabilities. In fulfilling these duties the Secretary receives advice and support from the Company Auditor.

2.2.2 Election of Officers

The Officers are appointed for a period of three calendar years by simple majority ballot held shortly before the final members' meeting of the third year, and the results of the ballot are announced at the meeting itself. The retiring Officers continue in their roles until the start of the next three period on the following 1st January.

Prior to the ballot nominations are sought from Individual Members or named delegates of Corporate Members of the UK Chapter. Candidates are invited to identify the role(s) on the UK Council in which they would like to serve. If there are insufficient or just sufficient nominations to fill the roles available, then no ballot is required.

2.2.3 UK Council Members

At the first meeting of IOM UK Ltd in each three-year period the Chairperson and Vice-Chairperson of the UK Council are elected by and from the Officers by simple majority. Other roles on the UK Council are negotiated and allocated to the remaining Officers under guidance of the Chairperson and are confirmed by a majority vote of the Officers.

2.3 Chairperson

The UK Council elects a Chairperson who ideally has prior experience as Vice-Chairperson.

The Chairperson has both an internal role and an external role.

2.3.1 Internal

The Chairperson chairs meetings of the UK Council and takes a leadership role in setting the strategic direction of the UK Chapter and proposing policies and initiatives. The Chairperson has no vote in formal resolutions except when a casting vote is required. The other Officers support the Chairperson in fulfilling their role.

The Chairperson maintains close communication with the Vice-Chairperson, Non-Executives, Secretariat, Working Groups and Committees and monitors the progress of their activities. The Chairperson may delegate day-to-day management for certain activities to another Officer, for example if that Officer is the Chairperson of the relevant Working Group or Committee.

The Chairperson retains personal responsibility for organising UK Council meetings and the UK Chapter Annual General Meeting (AGM). However, they will generally receive significant support from the other Officers, Non-Executives and Secretariat.

On an occasional basis the Chairperson may, on behalf of the UK Council, invite guests to join all or part of a UK Council meeting or AGM, for example as an external auditor, special advisor, or observer.

If requested, the Chairperson is ready to mentor any Officer who may need advice or support.

2.3.2 External

The Chairperson represents the UK Chapter and is particularly concerned with taking every opportunity to publicize, promote and develop UK Chapter, or to raise the profile of Obsolescence Management in wider industry, academia or government. Many of these opportunities involve the Chairperson acting as nominated author for articles, presentations, or press releases prepared by the Non-Executives and Secretariat.

The Chairperson acts as the first delegate of the UK Chapter to the International Board and plays a full part in the activities of the institute at the global level.

2.4 Vice-Chairperson

The UK Council elects a Vice-Chairperson who is normally the next in line of succession for Chairperson and ideally has experience as a Director of the UK Chapter. The Vice-Chairperson acts as deputy for the Chairperson and may be given delegated authority for specific responsibilities.

The Vice-Chairperson maintains regular contact with the Chairperson so that they are ready to represent the UK Chapter in the Chairperson's absence and deputise when necessary and mutually agreed.

The Vice-Chairperson acts as the second delegate of the UK Chapter to the International Board and plays a full part in the activities of the institute at the global level.

2.5 Non-Executives

From time to time the UK Council may appoint Non-Executive officers to undertake defined roles. There is currently one Non-Executive comprising the Chief Technical Officer (CTO).

The CTO is a service provider to the UK Chapter and provides extensive support. The responsibilities and deliverables are specified in a contract which is subject to negotiation and renewal with the approval of the Chapter Council at agreed intervals. For example, this includes representing the UK Chapter with other institutions and trade associations, preparing publicity, developing and maintaining the technical content of the UK Chapter website, and taking a lead in planning and delivering members' meetings, events and services. The CTO is also available to undertake similar contracts with IOM International and other IOM Chapters subject to rationalisation of the overall level of resource and funding.

The Non-Executives may be reimbursed for routine travel and subsistence expenses incurred on regular IOM business if they are not supported by their employer.

2.6 Secretariat

The Secretariat operates as a service provider to the UK Chapter. Its responsibilities and deliverables are specified in a contract which is subject to negotiation and renewal with the approval of the UK Council at agreed intervals. The UK Council may request additional services at an agreed hourly rate.

The roles of the Secretariat include:

- Day-to-day point of contact for enquiries from members and others including routine membership enquiries, membership administration, and internal referrals for more involved queries that cannot be resolved immediately.
- Day-to-day processing of routine financial transactions and updates to the financial and management accounts under supervision of the CFO.
- The exchange of data with IOM International concerning the administration of the UK members' records such as contact details, membership grade, the Obsolescence Management Practitioners' Register, and any Professional Registration with the UK Engineering Council or other registration authorities.
- Support to the Chairman re planning and logistics for the UK Chapter Annual General Meeting (AGM), and members' meetings and events. To include research into options for venues and costs, liaison with the selected venues and providers, and event management including support on the day.

- General maintenance of the UK Chapter website www.theiom.org including routine refresh of content as required. The Secretariat administers the arrangements by which Individual and Corporate Members to have access to privileged information and resources on the website by means of username / password.

3 Working Groups and Committees

3.1.1 At International Level

The UK Chapter participates in Working Groups and Committees where these are relevant to the interests of UK Individual and Corporate Members. Examples include The Professional Standards and Membership Committee and International Conference Committee.

3.1.2 At UK Chapter Level

Working Groups and Committees are typically led by the Chairperson or another Officer of the UK Chapter with delegated responsibility. There is broad flexibility in their constitution and terms of reference. Their membership depends on the task in hand, the desired outcome, and the availability of suitably qualified volunteers.

4 Members' Meetings

Each IOM Chapter has discretion to decide local policy on whether to allow non-members to sponsor members' meetings and on what terms. The UK Chapter welcomes non-members as sponsors if no Corporate Member is forthcoming. In addition, the non-member is charged a fee of 50% of the annual Corporate Member subscription. This fee can be offset against their subscription if they decide to join within one year of the date of the members' meeting.

In consideration of any sponsor's offer of support, the UK Chapter is willing to be flexible in negotiating any special requests the sponsor may make, such as the location of the meeting. However the decision to accept or decline such special requests will always be made in the members' best interests.

5 Membership

5.1 Individual Membership

The UK Chapter inherits the general arrangements for Individual Members and the structure of membership grades. In addition:

- IOM Chapters may, at their own discretion, offer Honorary Membership and the UK Chapter does this from time to time. The UK Council follows the regulations for the appointment of Honorary Members as set out in the International Handbook.

- IIOM Chapters may, at their own discretion, offer reduced annual subscriptions to Individual Members in at Affiliate, AIIOM, MIIOM and FIIOM grades. The UK Council has resolved that a 50% discount on the annual subscription will be offered where the member has reached state pension age and no longer undertakes paid work.

It is permitted to undertake unpaid work e.g. in academia, research or standards, or for IIOM or other professional institutes.

If you wish to apply for a reduced subscription, please send an email to the Secretariat of the UK Chapter at admin@theiiom.org.

NOTE: In the UK the state pension age varies according to your date of birth. You may confirm your state pension age by means of an online enquiry at the UK Government website <https://www.gov.uk/state-pension-age>.

- IIOM Chapters have discretion to establish additional, or different, arrangements for Professional Registration with an authority other than the UK Engineering Council but this option is not being pursued in the UK.

5.2 Corporate Membership

The UK Chapter inherits general arrangements for Corporate Members and the policy on delegate's entitlements. In addition:

- IIOM Chapters may decide the number of staff from each site that may attend meeting and events. The UK Chapter has resolved to allow two delegates from each site.
- IIOM Chapters may decide whether anyone from the site can act as a delegate or delegates must be identified by name. The UK Chapter has resolved that anyone from the site can act as a delegate, i.e. substitutes are allowed.

5.3 Membership Subscriptions

Each IIOM Chapter has discretion to decide subscription fees and when they become due. Subscription rates for the UK Chapter are given at <https://www.theiiom.org> and are payable in advance every twelve months on the 1st of April.

6 Social Media Policy

- A. The UK Chapter has resolved to have social media accounts for Twitter and LinkedIn.
- B. Any proposal for further social media accounts, whether additional accounts on existing platforms or accounts on new platforms, shall be approved by the UK Chapter Council.

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- C. Social media accounts will be used promote meetings, events and services offered by the UK Chapter, and where agreed by the Chapter Council, those offered by other IIOM Chapters, IIOM International, and organizations with which IIOM has mutual interests.
- D. Social media accounts will be used to promote the interests of sponsors for UK Chapter or IIOM International meetings and event, e.g. by means of links and reposts. This will apply from confirmation of sponsorship until completion of the meeting or event.
- E. Social media accounts will follow the social media accounts of UK and other Chapter members and relevant trade press and repost and “like” posts relevant to obsolescence or related topics. Individuals and organizations may nominate relevant accounts.
- F. UK Chapter members are encouraged to follow the UK Chapter social media accounts and link them to their own business and personal social media accounts.
- G. The UK Chapter social media accounts will be regularly updated to maintain their relevance to UK Individual and Corporate members and will have a posting timetable for each meeting or event.
- H. The UK Chapter social media accounts must not be used in any way that is unethical, that may damage the reputation of IIOM or bring it into disrepute, or to follow, repost or “like” etc. posts that have no relevance to obsolescence or related topics.

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