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# **Members' Handbook**

Issued under the authority of the IIOM International Directors

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## Change Record

Edition 4	June 2020, collation of legacy content from COG and minor updates
Edition 5	March 2021, incorporating changes and additions officially approved by the IOM International Board of Management
Edition 6	<p>June 2022, incorporating changes approved by the IOM International Board of Management: -</p> <ul style="list-style-type: none"> <li>• Honorary and Retired membership terms &amp; conditions</li> <li>• Appeals procedure for AIOM / MIIOM / FIIOM grades</li> <li>• New PSMC responsibility for IOM evening lecture series</li> <li>• Introduce Chief Executive Officer's role &amp; responsibilities</li> <li>• Add IOM France to IOM International structure diagram</li> </ul>
Edition 7	<p>January 2023, incorporating changes approved by the IOM International Board of Management:-</p> <ul style="list-style-type: none"> <li>• Change to term of office for President – no longer linked directly to International Conference frequency (3.4)</li> <li>• Policy on Photos and Videos at meetings (4.2.4)</li> <li>• Update of email addresses to iiom.global</li> </ul>
Edition 8	<p>Honorary Membership and IOM Training Providers Information updated</p> <p>Professional Fees included in Corporate Membership</p> <p>8.01 draft</p> <p>Restrictions on commercial activities of Individual Members</p>

## Referenced Documents

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

## 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 As a result, the Members' Handbook may sometimes be slightly out-of-date, or may not cover a topic that would be helpful.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@iiom.global](mailto:admin@iiom.global).

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## 1 Purpose of the Members' Handbook

Members must comply with the Regulations of IOM International as stated in this Members' Handbook and any local Regulations specified by their local IOM Chapter. The Secretariat of each IOM 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 IOM International) operates on a day-to-day basis for the mutual benefit of all participants. Your IOM Chapter may give extra information about any local Regulations, and advise you how IOM operates in your region, in an Annex to the Handbook.

## 2 General Introduction to IOM

IOM 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.

IOM International developed from the Component Obsolescence Group (COG) by a change of name and Articles of Association in 2015. COG was 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 IOM.

IOM International is an umbrella organization which operates through regional IOM Chapters with which it has established Delegation Agreements. The IOM 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 IOM Chapter of their choice. Each IOM Chapter organizes activities and events locally. IOM International organizes the International Conference and various central services for members.

Chapters are established in France, Germany, India, the United Kingdom and the USA. IOM 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 IOM 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.iom.global> 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.
  - 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@iiom.global](mailto:admin@iiom.global) 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.

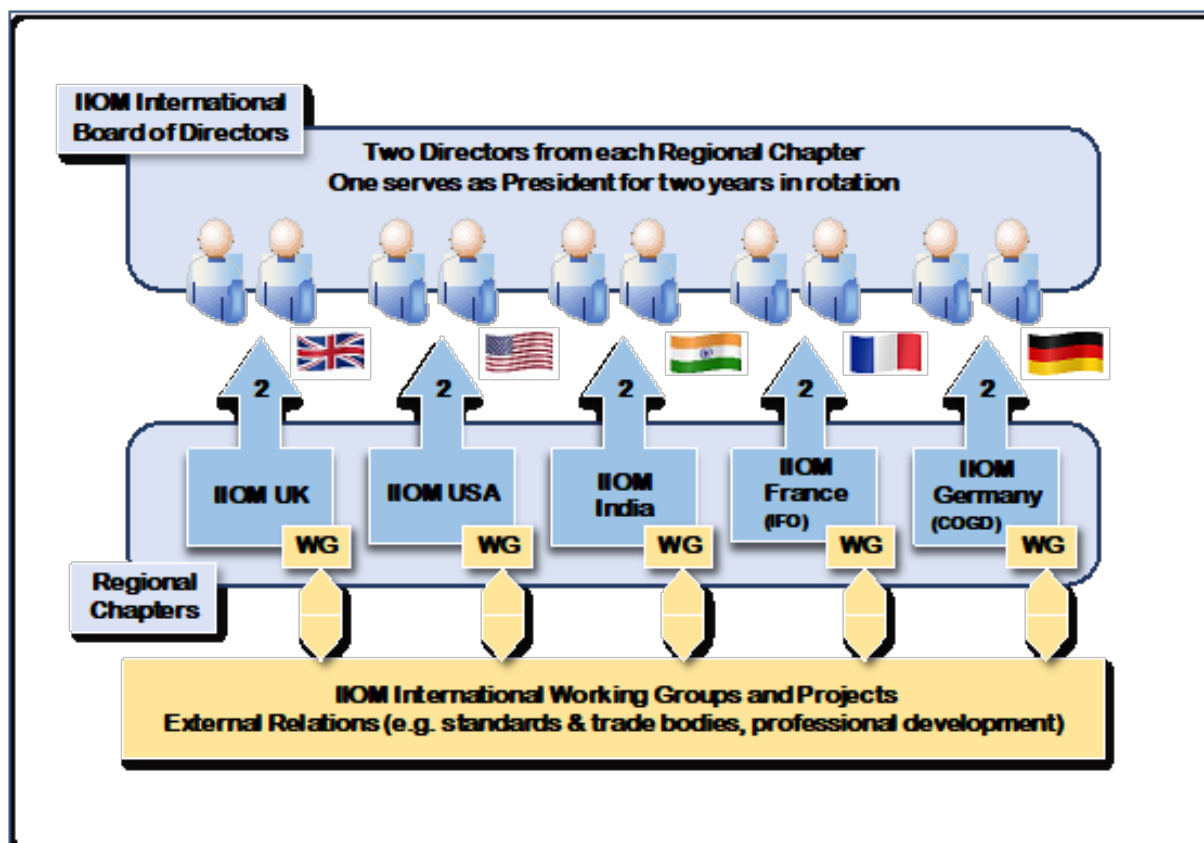
IEC	International Electrotechnical Commission	<a href="https://iec.ch">https://iec.ch</a>
AFNOR	Association Française de Normalisation	<a href="https://www.afnor.org">https://www.afnor.org</a>
BIS	Bureau of Indian Standards	<a href="https://bis.gov.in">https://bis.gov.in</a>
BSI	British Standards Institution	<a href="https://bsigroup.com">https://bsigroup.com</a>
ISO	International Organization for Standardization	<a href="https://www.iso.org">https://www.iso.org</a>
SAE	SAE International	<a href="https://www.sae.org">https://www.sae.org</a>
DKE	Deutsche Kommission Elektrotechnik Elektronik Informationstechnik in DIN und VDE	<a href="https://www.dke.de">https://www.dke.de</a>

- 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@iiom.global](mailto:admin@iiom.global).
- The IOM International Conference is a two to three-day event, normally held on an annual basis, 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, government and international organizations.

## 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 former Directors.

IIOM International has a legal relationship with each of the IIOM Chapters through a series of Delegation Agreements. The Delegation Agreements define the roles and responsibilities of IIOM International and each IIOM Chapter.

### 3.2 Officers

The governance of IIOM International is the responsibility of the International Board. The Officers of the Board comprise two Directors from each IIOM Chapter and the Company Secretary who is a non-executive Director.



### 3.2.1 Chapter Directors

There are two nominee Directors from each Chapter that has a valid Delegation Agreement with IOM International: -

- The first is the Chair of the Chapter Council, who will also be one of the Chapter Directors. Their term of office continues while they remain Chair 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 United Kingdom Companies House and His 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 they may be reimbursed for travel and subsistence expenses incurred on routine IOM business if 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

### 3.3.1 Chapter Directors

The Chapter Directors on the International Board take note of the strategic guidance and direction of the Chief Executive Officer (see 3.6.1) but they have the ultimate authority to establish suitable policies and initiatives as needed to best serve the current members, and position IOM for future growth. The priority is to ensure that IOM remains relevant, innovative, and sustainable over the long term. The Chapter Directors 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, government and international organizations.

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.

### 3.3.2 Legal Responsibilities

The Directors of IOM International have the legal responsibility to ensure that it conforms with United Kingdom legislation and regulation, and to ensure that IOM 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 1<sup>st</sup> 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).

### **3.3.3 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 IIOM and shifts in members' interests but will generally promote membership, raise awareness of current issues and ongoing initiatives, and promote IIOM activities and events such as IIOM International Conferences, IIOM Chapter meetings, and the formation of new IIOM Chapters.

## **3.4 President**

The position of President is a statutory appointment.

The period of office is two years. The incoming President takes over from the retiring President at an official board meeting and is the President for the next two years.

The position is assigned on rotation between the current Chairpersons of the IIOM 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 IIOM International and managing the IIOM 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, government or international organizations. 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 Executive Officer (CEO), Chief Financial Officer (CFO), Chief Technical Officer (CTO), the Head of Professional Development, and the Head of Standards & Accreditation.

The CEO, CFO, Head of Professional Development, and Head of Standards & Accreditation operate on an unpaid basis for most 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 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 may undertake similar contracts with IOM Chapters subject to rationalisation of the overall level of resource and funding.

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

#### **3.6.1 Chief Executive Officer**

The principal role of the CEO is to give strategic guidance to the International Board, and to direct and control the work and resources of IOM to ensure that it achieves its mission and objectives. The main responsibilities are to: -

- Provide strategic guidance to the President and other members of the International Board, ensure that the appropriate policies are developed to meet IOM's mission and objectives, and comply with relevant legislation, statutory regulations, and policies & standards established by the UK Engineering Council.
- Prepare, gain approval for, and monitor the implementation of the annual business plan for IOM International to ensure that technical, performance and financial targets are achieved, that revenue flows are maximised, and that fixed costs are minimised. Oversee the preparation of the annual report and accounts and secure their approval.
- Establish and maintain effective formal and informal links with relevant government, industrial, commercial, standards and academic organisations e.g. in matters of policy, strategy, planning and delivery, to ensure that IOM is providing the appropriate range and quality of services to Individual and Corporate Members.
- Develop and maintain research and development programmes to ensure that IOM remains coherent and relevant in obsolescence management and related capabilities.
- [Develop and maintain a communications and marketing strategy to promote the products, services, and image of IOM in the wider community.](#) Represent IOM in negotiations with customers, suppliers, government departments and other key contacts to secure the most effective contract terms.
- Develop, promote, and direct the implementation of equal opportunities policies in all aspects of IOM's work and encourage members' observance of the Code of Conduct.

### 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 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: -

- 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.
- Preparation for, and delivery of, the IOM International Conference in support of the organizing committee (see 3.8.2)

### 3.6.4 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 (FIIOM) 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.

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 audits conducted by the Council's Quality Assurance Committee (QAC) as required.

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

### 3.6.5 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, diminishing manufacturing sources and material shortages, anti-counterfeit, notice management, 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.
- Initiated future development of the standard including proposals for developing Part 2 concerning cost forecasting and Part 3 concerning formats and process for XML-based Product Change Notices and Product Discontinuation Notices.

There are other activities relating to standards and guidelines where IOM is internationally respected for its major contribution such as efforts to encourage convergence in terminology and underlying principles.

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 United Kingdom 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 AIOM 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 AIOM Short Course in OM**

The Committee is responsible for content and delivery of the AIOM 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.

IOM policy is to encourage the Endorsed Trainers to prepare course content in a range of languages, and to make reasonable adjustments to meet the needs of individual students.

IOM strongly encourages all training organisations running IOM endorsed training courses to have trainers who are recognised by IOM at MIOM or FIOM level. This will ensure the quality of the training and show the importance of professional development and recognition to trainees.

The level of educational attainment achieved by the AIOM Short Course is aimed at United Kingdom 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 IOM Online Lecture Series

The Committee is responsible for organizing online lectures with substantial learning or academic content on a topic related to obsolescence management. The aim is to provide Continuing Professional Development (CPD) to individual members by offering them the opportunity to both present and attend.

The logistics for each lecture are generally arranged to achieve the best-fit with the target audience, for example taking account of whether the subject matter is likely to be of general interest or is Chapter-specific, the language of the lecture, and which time-zones need to be accommodated.

The preferred means of delivery is via Microsoft Teams using the approved IOM PowerPoint template. Lectures are recorded and released on the IOM YouTube channel for the benefit of members who are unable to attend, and for the general community.

The typical format is: -

- Five minutes introduction by a member of the Chapter Council to which the presenter is affiliated, or by a member of the Committee
- Forty minutes lecture
- Ten minutes questions
- Five minutes closing remarks

### *3.8.1.3 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 IOM 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. Corporate Members are, however, required to comply with the IOM Regulations in this Members' Handbook as a condition of membership.

### *3.8.1.4 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 or Regulations is admitted or proved. Admitted or proved breaches attract sanctions commensurate with their severity and any impact on others. This can include withdrawal of voting rights or 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 on an annual basis 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.

## **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 United Kingdom Chapter by default as this provides some activities for overseas members.

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

- IIOM France (IFO) to promote membership in French speaking countries.
- IIOM Germany (COGD) to promote membership in German speaking countries.
- IIOM India to promote membership in the subcontinent, e.g. Pakistan, Bangladesh, Nepal, Bhutan, and Sri Lanka.
- IIOM 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 may be agreed locally and should be described in a Chapter-specific Annex 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 IIOM International. IIOM 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 IIOM International should be described in a Chapter-specific Annex to this handbook.
- Examining and setting of new initiatives to take the Chapter forward. This may involve co-ordination with IIOM 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 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 and this should be described in a Chapter-specific Annex to this handbook.

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 (see 3.8.1.4).

### 4.2 Members' Meetings

#### 4.2.1 Objectives

Members' meetings are 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 legislative and regulatory environment, e.g. -

- the registration, evaluation, authorization & restriction of chemicals (REACH).
- the restriction of hazardous substances directive (RoHS).
- waste electrical & electronic equipment recycling (WEEE).
- 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 invite delegates to explicitly 'opt-in' to sharing their name, organization, and email address on the published delegate list. For example, a suitable General Data Protection Regulation (GDPR) statement and checkbox 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 mailshots and must not forward details to third parties.

#### **4.2.4 Photos and Video**

Similarly, the Chapter should invite delegates to explicitly 'opt-in' to sharing their image in any photos or video material captured during the meeting. Delegates' images must not be included in published records of the meeting unless an opt-in is on record.

If the format of a meeting would make it impractical to protect the image of a delegate who chooses not to opt-in they should be advised not participate as a delegate.

#### **4.2.5 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 most 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 usually be uploaded onto the IOM Chapter's website subject to any restrictions the presenter specifies concerning protected content (e.g. copyright, intellectual property, International Traffic in Arms 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.

### 4.2.6 Participation

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

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

### 4.2.7 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 to obtain more 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

Individual Membership with professional recognition was introduced during the transition from our legacy organization (COG) to becoming a professional institution and learned society. 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.
- Recognise achievements and competence 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 most Professional Engineering Institutions and Professional Affiliates associated with the UK Engineering Council. The Council has global reach and is 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 of membership and the date of annual renewal, 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 IOM Chapters to avoid competition between Chapters for members.

Individual members will normally join the IOM Chapter linked to their country of residence, unless that Chapter does not accept Individual Membership in which case they will join IOM UK Chapter

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

### **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 (AllOM)**

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

#### **4.3.3.1 The AllOM Short Course**

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

When relevant to the students, e.g. those working in the USA, the Endorsed Trainers will often refer to the “Diminishing Manufacturing Sources & Material Shortages (DMSMS) Guidebook” SD-22. IOM encourages Endorsed Trainers to point out differences between IEC 62402:2019 and SD-22 in aspects such as definition of terms whilst affirming that the underlying principles of obsolescence management in the IEC 62402 standard and SD-22 handbook are similar.

Students who successfully complete the AllOM 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 AllOM applications.

NOTE: The IOM International Secretariat is subject to United Kingdom jurisdiction. To ensure compliance with the United Kingdom 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 AIOM Application Process*

The IOM International Secretariat has delegated authority from the Professional Standards and Membership Committee to process AIOM 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 (AIOM) by sending an email to [professional.development@theiom.org](mailto:professional.development@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 arrange to collect the fees from Individual Members. If the applicant is successful, the Secretariat issues an AIOM 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 IOM 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 IOM 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 (MIOM and FIOM)**

The Member (MIOM) 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.

MIOM 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

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 IIOM'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 IIOM International Board. Administrative of the process is delegated to the IIOM International Secretariat.
- As with many professional engineering institutions, the application criteria for MIIOM and FIIOM grades do not require applicants to sit an examination. Their criteria are based on an assessment of professional competence as shown by education, training, experience in academic research or industrial practice, and the support of people who know your work.
- The criteria 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 IIOM International website in MS Word and PDF format. The MS Word format allows the applicant and supporters to edit and save the information requested.

MIOM forms and guides: -

Ref 200709:	MIOM Supporter's Form Formulaire de Soutien MIIOM Formular des MIIOM-Unterstützers	Word	PDF
Ref 200710:	MIOM Application Form Formulaire de Demande MIIOM MIOM-Antragsformular	Word	PDF
Ref 200713:	MIOM Applicant's Guide Guide du Candidat MIIOM Leitfaden für MIIOM-Antragsteller	Word	PDF

FIIOM forms and guides: -

Ref 200711:	FIIOM Supporter's Form Formulaire de Soutien FIIOM	Word	PDF
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	Formular des MIIOM-Unterstützers		
Ref 200712:	FIIOM Application Form Formulaire de Demande FIIOM FIIOM-Antragsformular	Word	PDF
Ref 200714:	FIIOM Applicant's Guide Guide du Candidat FIIOM Leitfaden für FIIOM-Antragsteller	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@iom.global](mailto:admin@iom.global). 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 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 IOM 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 IOM 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 IOM 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 **Appeals Against Professional Membership Decisions**

Professional Membership refers to the grades of Associate (AIIOM), Member (MIIOM) or Fellow (FIIOM). Decisions to admit or transfer Individual Members to these grades are made by the Professional Standards and Membership Committee (PSMC) under delegated authority of the IOM International Board.

The PSMC aims to comply with best practice, legislation and regulation in equality, diversity, and non-discrimination. However, any individual whose application has been unsuccessful may appeal the decision. Appeals may only be made on the following grounds:

- A fault within the IOM process or mishandling of the applicant's application which affected their ability to present their case - refer to 4.3.3.2 for the Associate process or 4.3.4.1 for Member and Fellow process,

or

- Serious or exceptional personal mitigating circumstances that caused the applicant to under-perform, e.g. as the result of unexpected personal or family circumstances, or a technical problem with an online meeting.

The candidate should submit their appeal in writing, clearly and concisely setting out the grounds for appeal. The letter of appeal and any supporting evidence must be sent by email to [admin@iom.global](mailto:admin@iom.global) or by post addressed to: -

Professional Standards and Membership Committee  
International Institute of Obsolescence Management  
Unit 3, Curo Park  
St Albans  
AL2 2DD  
United Kingdom

Any appeal must be received by IOM within one month of the date of the decision letter.

The Chair of the Professional Standards & Membership Committee (PSMC) shall appoint an Appeals Panel of two who are independent of those involved in the original decision. All relevant evidence relating to the case shall be made available to the Appeals Panel.

The Appeals Panel shall report the outcome of the appeal to the Chair of the PSMC. The appellant shall be notified of the decision within one month of the letter of their appeal being received.

#### 4.3.6 Honorary Member

Honorary membership is for those who have made, or are making, a significant contribution to IOM. This contribution is voluntary and can occur across a variety of different initiatives related to IOM and benefiting the IOM Community.

IOM 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. 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.

The following entitlements and obligations apply to Honorary Members: -

- Subscription fees are waived.
- They may continue to use post nominal letters AIOM, MIIOM or FIIOM if previously entitled to do so, and will be listed in the Register of Practitioners, provided that: -
  - (a) they commit to the Members' Code of Conduct (see 3.8.1.3), and
  - (b) they undertake Continuing Professional Development (see 4.3.9.2).

For example, this may be appropriate for those continuing to work in a professional capacity including on behalf of IOM. There is no entitlement to specific post nominal letters for Honorary Membership.

- They are responsible for their own travel, accommodation and subsistence costs when attending IOM events including, but not limited to, Members' Meetings and the IOM International Conference. IOM may request a contribution to other direct costs such as conference refreshments and dinners. This is on the principle that their attendance at events should be cost-neutral to IOM.

#### **HOWEVER**

They may be reimbursed for costs incurred whilst on official business sanctioned by IOM International or an IOM Chapter. Examples include support to delivery of the IOM International Conference, contributions to formation of a new IOM Chapter, or

attendance at standards committees. The usual practice is that the likely expenses are reviewed in advance and an appropriate budget is authorized.

- They have the right to resign at any time.

#### **4.3.7 Retired Members**

Individual Members at Affiliate, Associate, Member or Fellow grade who have retired from paid employment are entitled to a 50% discount on their membership subscription as of their next renewal. Each IliOM Chapter aims to provide a simple online process for applications, and these will usually be reviewed and approved at the next meeting of the Chapter Council.

This entitlement does not apply to named corporate delegates who have retired unless they first apply to join as an Individual Member. This is most readily achieved at Affiliate grade.

The following entitlements and obligations apply to Retired Members: -

- They may continue to use post nominal letters AiliOM, MiliOM or FiliOM if previously entitled to do so, and will be listed in the Register of Practitioners, provided that: -
  - (a) they pay their discounted subscription at the appropriate rate,
  - (c) they commit to the Members' Code of Conduct (see 3.8.1.3), and
  - (d) they undertake Continuing Professional Development (see 4.3.9.2).

For example, this may be appropriate if working in a voluntary professional capacity.

- To achieve further savings in their subscription they may choose to revert to Affiliate grade and surrender the right to use post nominal letters, e.g. where there is no intention undertake further professional activities.
- They are responsible for contributing to the costs of any IliOM events they attend on the same basis as Individual Members paying a full subscription. The principle is that Retired Members should not be subsidized.

#### **4.3.8 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.

The Council invites each institution to review and update their profile on an annual basis. The IOM International Board delegates this task to the Professional Standards and Membership Committee (PSMC). The PSMC refers any recommended updates to the Board for approval.

#### *4.3.8.1 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 competences, 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. Professional Affiliates like IOM cannot undertake the process directly but are encouraged to form an Alliance with a PEI. Further progress towards an Alliance will depend on confirming sufficient interest amongst IOM's Individual Members.

#### *4.3.8.2 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 their Annex to this Handbook.



### 4.3.9 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.

#### 4.3.9.1 Initial Professional Development (IPD)

IPD refers to the education and workplace development that takes place prior to Individual Members being included on the IOM Register of Practitioners at AIOM, MIIOM or FIIOM grade. This is when aspiring professionals learn to apply their knowledge and understanding, develop their skills and competence, and begin to apply professional judgement.

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 (PEI), 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 an Alliance between IOM and a PEI.

In the meantime, IOM International supports IPD for Individual Members of IOM at technician level (AIOM and EngTech) through the Endorsed Trainer Scheme and AIOM 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.

#### 4.3.9.2 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 IOM 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 IOM to

- Encourage all Individual Members on the IOM Register of Practitioners (i.e. those in AllIOM, MIOM and FIOM grades) to undertake CPD even when they do not have Professional Registration as EngTech, IEng or CEng. IOM 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 IOM Chapter level and at the IOM 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.

#### 4.3.10 Activity Restrictions for Individual Members

An Individual Member of any classification (AllIOM, MIOM, FIOM, Affiliate, Student, Retired etc.) shall not solicit or conduct business at IOM meetings, seminars or conferences, and shall

not solicit business using IOM membership lists or IOM meeting attendee lists. This includes individuals who are sole traders.

This rule is to protect the commercial interests of IOM's Corporate Members whose annual subscription is significantly higher than that for Individuals Members.

## 4.4 Corporate Membership

### 4.4.1 General Arrangements

The concept of Corporate Membership remains a core element of the strategy for the development of IOM. 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 IOM International and the local IOM Chapter are funded in proportion to the number of sites where staff use IOM services.

A Corporate Member can nominate up to two Individual Members with AIOM, MIIOM or FIIOM qualification to be included within their Corporate membership at the annual renewal point; the individual then does not have to pay an Individual annual membership fee to maintain their professional registration. In the event of the individual leaving the employ of the Corporate member, their registration remains valid until the end of the membership year of the Corporate member.

Each IOM Chapter has discretion to define local Regulations covering Corporate Membership. These should be given in an Annex to this Handbook. For example these may include: -

- 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 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.
- Each IOM Chapter is free to decide the voting rights for a Corporate Member. In this case the Council of the IOM Chapter should describe the voting rights in their Annex to this Handbook.

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

NOTE: While IOM has Corporate Members alongside Individual Members it does not operate as a "trade association". All members contribute equally to, and benefit from, the

professional institution and learned society activities as described throughout the Members' Handbook.

#### 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 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 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@iom.global](mailto:admin@iom.global). 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@iiom.global](mailto:admin@iiom.global). 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 IOM logo may, at the discretion of the IOM International Board, result in sanctions including withdrawal of the member's entitlements or cancellation of IOM membership.

## 7 Internet Domains

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

Each IIOM Chapter agrees an official sub-domain name with IIOM International. This takes the form [\[country-or-region\].iiom.global](#) 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:

- france.iiom.global
- germany.iiom.global
- india.iiom.global
- usa.iiom.global
- uk.iiom.global

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.

## 8 IIOM Privacy Policy

IIOM is committed to ensuring that your privacy is protected.

This privacy policy explains how IIOM 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 IIOM 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

IIOM 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 IIOM International and IIOM Chapter developments. By providing us with your personal information, including through use of IIOM International and IIOM Chapter websites, you are agreeing to this policy.

### 8.2 Staying in Touch

When members and others contact IIOM International or an IIOM 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 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@iom.global](mailto:admin@iom.global).

## 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@iiom.global](mailto:admin@iiom.global) or write to us at: -

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Unit 3, Curo Park, Frogmore, St Albans, Herts, AL2 2DD  
UNITED KINGDOM

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