

Academic Community Constitution and Governance Document

Purpose

The STEP Academic Community provides a forum for both research and teaching academics as well as estate practitioners to:

1. engage in and disseminate between their respective communities, the results of relevant research, and practical experience, that
2. advances the field of knowledge and practice represented by STEP, for
3. the benefit of society and STEP members.

Terms of Reference

1. Evolve a scholarly community that is focused on both teaching and learning as well as primary and applied research, in academic fields aligned to STEP, including
 - the law and practice of trusts, property and estates both before and after death; irrespective of the form of ownership of property concerned in the estate.
 - the law and practice of taxation,
 - the profession of accounting, and
 - the commercial fields of banking, finance, life risk, entrepreneurship and
 - the administration governance and succession to private wealth, irrespective of the form of its ownership
2. Provide a communications platform for that scholarly community to develop their knowledge and practice around existing and emerging areas in academic fields aligned to STEP and to promote their research and other activities
3. Contribute thought leadership to the education and public policy work of STEP Worldwide
4. Publish scholarly articles for journals under the auspices of STEP
5. Bring together practitioners and academics active in this broad-ranging community, not just STEP members

Aims

- Foster research aligned to the Society's interests on a single disciplinary, multi-disciplinary or interdisciplinary basis.
- Raise profile of the society within universities and institutes of higher learning
- Form collaborative research partnerships or working groups with universities, institutes of higher learning, practitioners or employers
- Bridge the theory and practice divide dialogue between academia and practitioners
- Contribute to thought leadership disseminated through STEP

- Promote of teaching, learning and research within the academic fields aligned to STEP
- Support the realisation of the intellectual capital within the Society for its commercial and philanthropic purposes

Remit

- Establish a programme of activities which further educate and promote technical understanding within research and practice areas.
- Develop the membership of the group geographically and by subject area relevant to STEP on an international basis (not necessarily restricted to the membership of STEP but including the academic and professional fields to which STEP and its members are engaged);
- Develop a teaching approach and promote that approach within higher education providers aligned to STEP;
- Facilitate the alignment of teaching and learning between the academic focus of higher education providers and employers
- Extend academic focus on a multi jurisdiction basis
- Extend academic research focused on globally consistent issues
- Support and act as ambassadors for the work of Professional Development (including development of qualifications, EPP etc) and Membership Routes to the Society (including qualification and essay routes)
- Commercialise research output

Outputs

- Annual conference
- Regional colloquiums or seminars
- Leverage network of potential collaborations, employers and institutional and industrial partners interested in STEP.
- Production of scholarly articles and papers related to the field of trusts and estates for publication and dissemination via the Society's communication channels etc
- Support the evolution of teaching and learning as it relates to estates practice in single discipline and multi discipline settings.
- Support the formation of university partnerships
- Lectures for STEP Events

The Academic Community will disseminate communication about the above matters between STEP members and the international academic community and the broader STEP network.

Membership

Membership of the Academic Community is free to both members and non-members of STEP.

Membership is open to any practising academic or researcher working in any discipline which aligns with the interests of the society in a recognised institution of

higher education which has degree awarding powers on either a full or part time basis.

Students who are pursuing a research degree may also participate in the community. Students studying on a taught course may not join the community irrespective of whether their degree has a dissertation or thesis element.

Membership is also open to practitioners who can demonstrate commitment to lifelong learning and furthering research and intellectual capital in their area of expertise.

There is no fixed term of membership of the Academic Community. However, membership is subject to the continuation of each member's professional and academic standing in their own jurisdictions.

Those interested in registering as members of the community should complete a registration form and supply an Academic CV for consideration by the Committee.

Officers

The Academic Community will elect from its members the following officers to a committee. This must be made up of STEP Members. The committee will retain oversight of the Community's membership across the society and their activities.

A Secretary to the Community shall be appointed from a staff member within the STEP Worldwide office.

The Committee will meet a minimum of three times per year via teleconferencing.

- Chair
- Deputy Chair
- Events Liaison Officer (*Optional*)
- Syllabus lead (*Optional*)
- Publications lead (*Optional*)
- Teaching and learning lead (*Optional*)

In addition the Community will operate advisory working groups on an ad hoc basis representing research areas, activities and promotion of the community or regional advisory group promoting the community within their geographical location. These will report back to the committee.

The Community will be organised in order to enable community members, wherever based, to set up working groups. These can be arranged as per the preferences of the group's members (research interest, region, jurisdiction etc.) These may be formed at the direction of the Committee or on a self-service basis, however an active working group must notified to the Secretary and provide a brief report into the Committee in advance of a committee meeting or PDC report.

Reporting

A bi-annual report will be produced for the Professional Development Committee on major activity undertaken and planned.

Authority and Oversight

The Academic Community must refer any representation it wishes to make in STEP's name to the Professional Development Committee who will consider the Community's representations and will in turn refer the matter for Board approval (if appropriate) before the representation will be endorsed by STEP.

The Professional Development team will retain oversight of the administration, management and ongoing oversight of any partnerships, funding and sponsorship arrangements.

**Madeleine Jenness
Education Manager
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