



Royal Microscopical Society

Five-year Strategy

2022 - 2027

This document is a broad overview of what the Society wishes to achieve in the next five year period and includes brief descriptions of how it plans to do this.

Modified: 7 March 2023

Approved: 3 May 2023

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Note: Throughout this document, the terms 'member' and 'members' is deemed to also include Fellows of the Society.

SUMMARY OF MAIN TARGETS – March 2023

Events:

- Run a full series of microscopy-related meetings, workshops and training courses, and the mmc series, including a meeting in London every other year.
- Diversification of events where opportunity exists.
- Collaborating with other organisations as appropriate to ensure critical mass, as well as running sponsored events for external organisations,
- Increase number of online events to generate greater international attendance, particularly those in developing countries, and also help those with accessibility/parental commitments.
- Ensure full equality and diversity of organising committees and speakers. An EDI&A policy and Code of Conduct for meetings are already available on the website, and these should be reviewed regularly.
- Run workshops for early career researchers at our meetings, where appropriate
- Host large microscopy related conferences on behalf of other organisations, where appropriate
- Continue to raise the Society's profile and activities outside of the UK

Membership

- Increase membership numbers.
- Promote membership overseas, especially those in developing countries who will be offered a reduced membership fee.
- Promote all of the RMS awards
- Develop and promote the Groups function on the website to encourage networking between members.
- Further develop the 'ambassador' scheme to promote the society and membership and enable membership feedback.
- Consider regional 'chapters' to facilitate more direct member involvement in RMS
- Continue to promote development of student/early career researchers via the Early Career Committee

Publishing

- Ensure that the Journal of Microscopy is adequately supported and staffed
- Seek to improve the Journal Impact Factor
- Mitigate for income reduction on eventual switch to a completely open access journal
- Increase submissions to the journal, including increased reviews and special issues
- Promote and develop on-line access to **infocus** magazine for RMS members
- Make full use of social media to publicise the society's activities

Outreach and Education

- Promote science education in schools via microscopy and work with new Patrons to raise profile for these activities on a national level (STEM links)
- Support the MAK (up to 100 units) and Tabletop SEM Schemes
- Develop a Chartered Microscopist scheme
- Promote the Diploma
- Continue to develop online provision of various activities, including links to useful sites for microscopy and examples of outreach activities for public outreach events
- Develop outreach activities for secondary schools (16-17 years old)
- Continue to provide small bursaries for RMS members for outreach activities, by application

Governance, staffing and infrastructure

- Trustees and staff will run the Society in accordance with best-practice as defined by the Charity Commission and the Society's auditors. This includes contingency and disaster recovery plans, consideration of IT and website provision and maintaining our accreditation by Authorised body for ISO 27001 and GDPR
- Support RMS staff and develop their career development and training
- Support and encourage science sections and CAB to contribute towards our strategy
- Encourage/promote member-driven Focused Interest Groups to address key issues, and explore new areas as necessary

External relations: Research Councils and International Bodies

- Support community driven initiatives and networking, including BiolmagingUK
- Continue active involvement with the Research Councils and other funding bodies
- Respond to any open consultations which impact microscopy

Finance

- Build up reserves to cover potential loss of income, and mitigate for impacts from Covid-19, the war in Ukraine as well as a reduction in Journal income.

NARRATIVE

The efforts of the Society will continue to focus on four main areas of activity, which include Events, Membership, Publishing and Outreach. These activities are underpinned by Governance, staffing and infrastructure, and by the activities of each of our sections (Life Sciences, Light Microscopy, Electron Microscopy, Flow Cytometry, Scanning Probe Microscopy, Engineering, Physical and Materials Sciences, Data Analysis and Imaging, and Outreach) together with the Corporate Advisory Board, and Focused Interest Groups. The RMS has also begun to develop its interactions with the Research Councils, Funding Bodies and Biolmaging UK, and will continue to do so. We also keep a watching brief on other related societies.

Events

A key activity of the Society is to support those interested in and working in the field of microscopy. To support this, a major objective is to continue to run a varied programme of meetings, and training courses. The Covid-19 pandemic resulted in a switch to virtual meetings. These can be useful and some element of virtual events will be continued going forward as we also switch back to in-person meetings. Future events are likely to be a mix of in-person and virtual meetings.

Types of Meetings: These include *Workshops* (addressing practical work), *Focus Meetings* (on emerging techniques), *Symposia* (one-day scientific meetings), *Technology Forums* (one or two-day technology focused) and *Conferences* multi-day scientific meetings, including the Microscience Microscopy Congress (mmc) series. There is a clear set of guidelines as to the type of meetings that the Society holds and the responsibilities of the scientific organisers. Short courses and workshops are additionally included as part of MMC to improve justification for industry/university attendance. Key to all of our meetings is to make sure we do ensure full equality and diversity for organisers and speakers. We have developed an EDI&A policy to address this, which is publicised on our website, and included in guidelines for meetings – the EDI&A policy will be regularly reviewed and updated. We already ask all attendees to read the code of conduct for meetings, and the EDI&A policy is an important addition to this.

We also support Biolmaging UK (since 2018), a joint venture with UKRI, and help to run Biolmaging UK events and associated meetings, surveys etc, including a BBSRC Business Voucher competition.

Evaluating Meetings: All of our meetings have a clearly identifiable RMS “feel” and have the overall aim of providing both excellent science and networking opportunities. Where possible, meetings will try to accommodate associated exhibitions related to the meeting. The Honorary Secretaries for Science together with the Science Sections and FIGs all plan and vet meetings rigorously to help ensure their success, and this should include a financial overview for each meeting. Section Chairs meet regularly to discuss and coordinate meetings and events, marketing, committee structure, section involvement in mmc and interactions with external organisations. The Honorary Secretaries and Sections will continue to regularly evaluate the list of meetings and training courses with the aim of identifying any missing areas and suggesting new possibilities. Short, one day meetings should continue to be encouraged, as these small meetings can be cost-effective, productive, meet the short term needs of the community and address niche technique groupings.

MMC is now established as the Society’s flagship congress and held every two years in Manchester. The mmc2021 Congress was virtual due to Covid-19, and will return to being an in-person Congress in July 2023. We plan that mmc will continue to expand as it has done over the past few years through its collaboration with EMAG, and that workshops and satellite meetings

will continue to be held either side of the main congress to encourage more attendees. We will continue to explore additional collaborations with other scientific societies, to enable them to hold sessions under the mmc umbrella. The microscopy and imaging company exhibition is specifically marketed as: 1) being free to attend; 2) the largest dedicated microscopy show in Europe; and 3) an excellent opportunity to learn about the latest technological developments in instrumentation and analysis. There is an increased emphasis on attracting attendees from all around the world, through EMS regional societies and groups, IFSM, MSA, BINA and the use of list servers and microscopy groups on LinkedIn. We will also explore alternative venues to Manchester for future mmc events, partly to help us refresh the meeting.

The mmc meeting incorporates a 1-day early career meeting at the start, to enable ECRs to share best practices and to have useful discussions and presentations on a wide range of topics from obtaining funding, alternative careers and publishing, as decided by the ECR committee. The RMS is committed to supporting and helping the ECR committee run this workshop as part of mmc.

The Corporate Advisory Board (CAB), consisting of members representing small, medium and large companies, provides important feedback concerning the exhibition, as well as our planned meetings, and other activities of the Society.

Frontiers in Biolmaging has been established as a meeting that runs every year, either within mmc, or as a stand-alone meeting (in non-mmc years). This is a joint meeting between the Life-Sciences Section, the Light Microscopy Section and the Electron Microscopy Section. We will consider asking other sections to be involved as and when appropriate. The meeting venues in non-mmc years will vary (eg. Manchester, London, Glasgow). The chairs for sessions at these meetings are comprised of members of the different sections, and this enables our sections to work together to organise these meetings.

In the intervening years between mmc in Manchester, we aim to hold a meeting in London. We currently run a short one-day event that encompasses our Annual General Meeting, which is free to attend and is specifically aimed at RMS members. The viability of these meetings will be evaluated by the various Society committees. This London meeting could be the Frontiers in Biolmaging Meeting in non-mmc years.

Facility Managers Meetings: These are now well-established and extremely popular. After the success of the initial meetings for Light Microscopy, we will continue to run similar meetings for Flow Cytometry and for Electron Microscopy. There is interest from the Facility Operation and Management Focused Interest Group (FOM FIG of the Microscopy Society of America) in linking with RMS Facility Managers Meeting to develop and share best practices.

Training courses and workshops are essential to support microscopy education. We recently implemented a training focussed interest group (in 2017) to evaluate our current portfolio of courses, and to recommend any 'gaps' in training that we might need to address. While some recommendations from this evaluation have been implemented, we now need to encourage the science sections to continue to think about how we can refresh and update our courses, and how we could develop and implement on-line resources.

Working with other Societies: The Society's infrastructure and financial stability make it an attractive partner for other Societies to work with. Where possible, the Society will take opportunities to organise events on behalf of other organisations/entities, and/or to sponsor sessions in meetings run by other societies, to raise the profile of the RMS. This will also facilitate meetings run by smaller groups with no infrastructure to organise an event.

Advertising meetings and workshops and raising the Society's profile outside the UK: The RMS has a well-developed strategy for advertising meetings, and our increasing membership helps. We have already identified ambassadors within organisations, in both Universities and commercial laboratories, who advertise to their organisations on our behalf, and promote the Society, and we will build on this. We will run regular short meetings for these Ambassadors on an annual basis, and as part of this meeting, use these Ambassadors as a focus group, by asking for their ideas and feedback on membership. This meeting should take place at mmc in 'odd' years.

Membership

Numbers: There will be continued face-to-face recruitment at a range of domestic events and at selected international events. The overall aim was to increase membership numbers at the rate of 10% a year for the foreseeable future. Good progress was being made with a clear upward trend rising from under 1300 at the end of 2013, to just over 1500 members at the end of 2018, but this appears to have now plateaued. The title FRMS was well-received by members and helps the society to maintain its membership. Attracting more corporate members will also be explored, particularly in industries that rely heavily on imaging as part of their business. We need to identify the particular benefits that interest corporate members.

We hoped that a free studentship membership year would increase membership numbers. However, the majority of Free Student members did not renew at the end of their free year. We have reviewed this strategy and a small charge has now been introduced for some student membership categories going forward.

We have also considered the cost structure for other membership categories as part of our strategy discussions, and to consider implementing a new Affiliate member category to encourage microscopists in developing countries to join. With the introduction of an online **infocus**, membership fees for existing categories have now been reduced to 50% for those members in developing countries. We will improve our analysis of membership statistics to monitor membership retention and continue to monitor our membership rates on an annual basis.

Promotion of the RMS awards: The Society awards a range of honours and prizes to recognise scientific achievement in microscopy-related research and education. These include Honorary Fellowships and the Pearse Prize. Of note: a Nobel Prize has been awarded to two former Pearse Prize winners. Each section is now able to give an award to an outstanding junior researcher in their subject area, on a two-yearly basis, which can be awarded to anyone across the world. We have also implemented senior awards (Scientific Achievement), an early career researcher award and the Chris Hawes Outreach and Education Award. Appropriate changes to the RMS Charter have now been made that have allowed us to increase the number of Honorary fellows from 65, and in the Rules we have said a maximum of 100. A consistent process is now in place for selecting Honorary Fellows to ensure that the list reflects the Society and important advances and contributions to microscopy. Honorary Fellowship proposals are scrutinised by the Executive Committee before nominations are taken to Council. The Executive Committee will identify gaps and make further recommendations to Council.

Ambassador scheme: We put in place an Ambassador scheme (in 2018), in which volunteers at a range of institutions have agreed to help us publicise the society and its events. We need to develop this scheme further, and ask our Ambassadors, as well as sections, for feedback on how we can improve the membership experience. We can also ask them about regional chapters to encourage more involvement of members in the RMS.

Promotion of ECRs: As part of our strategy to increase membership, we aim to develop mechanisms to encourage more junior scientists (PhD, Postdocs) to engage with the society and contribute to our meetings. With the development of the website, the groups area and a mentoring trial, this should enable members to interact with each other, and potentially get together in regional meetings/chapters.

Merchandise: Members are proud to be part of the Society and we anticipated that they would welcome branded merchandise (clothing, cards, etc). However, we have now run a pilot scheme to provide RMS branded merchandise, this has not been as successful as we would have liked, and we need to consider if we want to continue this in the future.

Publishing

The Journal of Microscopy is an important income stream for the society. We will ensure that it continues to be supported through adequate staffing levels. These staff additionally provide capacity to increase income from other streams such as advertising from **infocus**. We will refresh Journal Editors and the Editorial Board on a regular basis. Editors, and the Editorial board will have a clear description of their terms of reference and a defined term of office.

Impact Factor: Impact Factor is seen as increasingly important, and there is an issue that our current impact factor is low, varying between 1.4 and 2.1 over the past 6 years, and currently 1.952 (April 2022). We will aim to improve the Journal impact factor, improve the publishing experience, and by encouraging suitable papers to be published in the journal.

Strategies include:

- Ask experts in the field to publish short, invited reviews
- Develop targeted special issues
- Ask sections to promote the journal and suggest topics,
- Ask the mmc Scientific Organising committee to suggest papers related to sessions at the conference
- Produce regular Festschrifts, honouring respected microscopists to be published during their lifetime.
- Put postcards onto posters at RMS conferences inviting authors to submit.
- Hold regular editorial board meetings (2 per year) to obtain suggestions for reviews, special issues and so on.
- Diversify the editorial board

We have considered the effect of proposed changes to make the journal entirely open access in the near future (Gold Route), which will roughly decrease the income from the journal by ~50%. To offset this and maintain the income, we'd need to double the number of papers published in the journal. We have held editorial board meetings (virtual) to canvass ideas for new reviews, special issues and so on, and plan to hold them every 6 months. We have received valuable suggestions, which we are acting on. However, inevitably it will take time to implement these, and we will also need to consider cost-cutting actions elsewhere across the society to offset potential losses from the journal.

Marketing of the Journal: The Journal benefits from strong links with Wiley. Staff from Wiley and the RMS work closely on marketing and development. Every opportunity will be taken to promote the Journal as *the* journal of the Society at RMS and non-RMS events. However, we do need to consider how to make this more effective.

Infocus continues to develop, in particular with regard to the possibility of online publication and publication in different forms suitable for viewing on tablet and other mobile devices. The Scientific Editors are actively involved in sourcing articles, supported by the activities of Council and the Sections. A new **infocus** Scientific Editor, Dr Leandro Lembruger was appointed in July 2021. We have considered refreshing our 5-year strategy for **infocus** with the aim to maximise outreach (e.g. sample issues to members of other Societies) and increasing income (primarily through advertising). An online version of **infocus** has now been implemented, and switched to online versions only from January 2023 with the March 2023 issue. Advertisers may view an internationally disseminated online **infocus** as an added benefit. Selected articles (with an advertisement) to be available free of charge to non-members on a monthly basis. This will increase the visibility of **infocus**, encourage new members, encourage more microscopy companies to promote themselves by advertising, as well as generating additional income for the Society. This would be a good international publicity vehicle for the RMS (particularly in Asia).

Social Media: RMS Website: The website will be kept up-to-date and social media will continue to be used as a marketing tool and to provide a forum for networking and as an exchange of information and ideas. The email newsletter includes a table of contents from the Journal of Microscopy as well as RMS events and targeted event specific newsletters, as well as member newsletters. The potential of offering sponsored newsletters will be explored.

Books: The publishing agreement with Wiley will be utilised to the full with a number of titles per year being produced, including titles based on the material taught on the Society's courses. We will continue to identify a number of book titles per year through active involvement of Science Sections and the wider membership.

Outreach and Education

We will continue to fund and support Outreach and Education from our reserves, and from in-year activities. The direction and scope of outreach is defined by the Outreach Committee which

comprises representatives from academia, Primary/Secondary education and others with an interest in bringing the Society to a wider audience. Promoting microscopy in schools for all age groups is a key activity we wish to develop. Our Patrons may be able to help us with raising our profile in this area, and we need to actively explore this.

MAKS: There are currently 90 Microscopy Activity Kits (MAKS) in circulation and we have agreed to increase the number of kits up to a maximum of 100, depending on demand. The scheme is supported by County Print Finishers. Our current goal is to maintain our activity at up to 100 kits, and this will be reviewed on a regular basis. We will also consider requests from outside the mainland UK with the Society bearing the additional cost associated with sending to remote locations. Funding for the MAKS needs to be reviewed regularly. The kits will continue to be developed and reviewed by our 'MAK champion'.

Microscopes for secondary schools: Given the success of MAKS for primary schools, we will continue to review the possibility of developing activities for secondary schools. Developing curriculum links, fostering further development of activities and engaging with outreach and education activities in other organisations should help with this. Microscope activities are not specifically covered in the secondary school curriculum. The report on the success of the MAK scheme, written by a recent PIP intern student, has been used to demonstrate the credibility of the RMS in relation to being able to lobby for microscopy in the curriculum. Most recently, we have been part of a scheme to take two tabletop SEMs to schools, and we need to develop this scheme further.

Outreach Bursaries: We have developed a small bursary scheme for RMS members for outreach activities. We should assess the success of this scheme.

Diploma Scheme and Chartered Microscopist Scheme: The Diploma scheme is aimed at anyone (UK and overseas) who works in microscopy and who wishes to develop their theoretical and practical skills in microscopy, while undertaking a significant microscopy project and a portfolio-based qualification evidencing continuing professional development in a range of related skills. The project guidelines have been recently updated and are all available online. The Diploma process is overseen by a subgroup who report to the Outreach Committee and are responsible for considering applications, assessing projects, portfolios and awarding summer placement studentships. We will consider how we promote and support Diploma Candidates: e.g. providing the ability to view previously submitted projects as a guide for writing one. The project title and project summaries appear in **infocus** when the diplomas are completed. The Diploma Scheme is also promoted in **infocus**.

We will develop a case for this Scheme to be extended towards providing a Chartered Microscopist Status, which we should be able to award from the society (e.g. RMS Chartered status).

Meetings and resources for Amateur Microscopists: We have previously considered holding non-specialist meetings for amateurs, which would include providing a selection of items of historical and general interest, called 'the holding collection'. (The Society's heritage collection will be left in the care of the Museum of the History of Science.) To achieve this, we will need to establish links with amateur societies, which will be achieved via our History Committee. Linked to this is our aim to provide material that is suitable for all newcomers to microscopy, including literature and on-line resources. It may be possible to run a display or hold an event at Parliament with the help of our new Patrons.

Online Resources: A major theme is the provision of more online resources for members, and microscopists, from advice on microscopes suitable for public engagement events, to training resources. We will continue to assess our online provision, what would be useful, what is already available that we could link to, and what we could provide universally, and what might or should be restricted to members only. Other organisations such as BINA, via CZI, are currently setting up a central resource as part of a DB Microscopy webpage.

Heritage (Holding) Collection and History of the Society: The historical collection of microscopes is under the control of the Museum of the History of Science where it can be properly curated. We have a long-standing goal to have a smaller handling collection which is put on display at appropriate opportunities including mmc. This will continue to be coordinated by the History

Committee, with involvement from the Outreach section. There could be some consideration as to how this could be made available online, perhaps alongside an interactive 'timelines' webpage.

The Abbé Letters held by the Museum have now all been scanned; and the goal is to make these available online together with the collection of letters held by the Zeiss museum in Jena, a goal that has been somewhat delayed by Covid-19. Further developments for publication of a selection of letters alongside a narrative will be considered.

Governance, staffing and infrastructure

The Trustees will continue to be forward looking, helping the Society to keep abreast of new technology and techniques and to meet the needs of its members and wider audiences. This will be supported by the actions of vibrant Science and Outreach Sections. The overall Governance management of the Society will follow best practice as laid down by the Charity Commission and as advised by the Society's auditors. We are continuing to maintain our accreditation for ISO27001 and GDPR.

IT: We continue to maintain and upgrade our IT provision, and a trustee is in place to advise and oversee IT Strategy. IT Strategy for the office includes ongoing staff training on software, seeking external advice on where the Society develops in the future with regard to IT. We have improved our internet service provision to facilitate storage and retrieval of material held off site, and help staff working from home. We have now implemented a new CRM system and trained staff in its use.

Website: Phase 2 of the new website has now been completed. A working group could be established to ensure that all users of the site are catered for such as Research Groups, Teachers, Children etc and to allow for input on the look and feel of the site.

Staff: The Society has a motivated and talented team of staff. To maintain this level of motivation and to develop skills to support the Society's strategy, we will annually review terms and conditions to maintain attractive and competitive packages of employment. Long-term training needs and career development will be agreed during annual reviews. Adequate annual funds for training and career development will be provided. The Society has started to support having regular interns – this helps to support their careers, whilst also helping our own staff to develop their training skills. It also enables the Society to try things not otherwise possible due to time restrictions. The office environment and infrastructure will be maintained to provide healthy and safe working conditions. The current available office space limits the number of staff that can be employed, and thus we will periodically consider the feasibility of moving office premises and either keeping the existing building to provide rental income, which can be used towards rental costs of alternative office space, or, selling the building to provide funds to purchase alternative premises.

Patrons: Two Society Patrons from the House of Lords, Baroness Finlay of Llandaff, and Baroness Brown of Cambridge CBE FRS were appointed in November 2017. They have offered to help us organise meetings in the Houses of Parliament, which would help to bring in high profile speakers and participants, for key discussion meetings.

Sections: The Sections are very important to the Society and comprise committed and well-respected members keen to further the objectives of the Society. They are all volunteers, and it is crucial that we support them and encourage them to take part in even wider participation/involvement in the activities of the Society. We should review the Sections every 5 years to ensure that they remain in-line with the needs and direction of the Society and its membership. We should continue to make existing members of the sections aware of the structure and workings of the Society and the ways that they can be involved. We need to make sure we support them appropriately in running meetings, workshops and mmc sessions. Similarly, the Section Chairs meeting is an important forum for the development of the scientific direction of the Society. There is a regular call to the membership for new members of Section committees.

Focused Interest Groups (FIG): we now have successfully set up a range of FIGS as needed based on the common scientific/technical interests of a group of RMS members. These allow the Society to address a particular area of our activities (such as Training). FIGS provide a unique way for RMS members to organically develop groups of common scientific interest that are not necessarily addressed in existing RMS sections. If the FIGs continue to grow and are highly active, they can develop into a new Section. The FIGS report back to relevant Section Committees,

although most FIGs cut across Section boundaries, and all report back to the Section Chairs Meetings. This allows us to develop a flexible way to analyse our activities and explore new opportunities.

External relations: Research Councils, CDT training, International Bodies

Biolmaging UK: We have developed our relationship with Biolmaging UK, helping them to hold discussion meetings and so on. In 2018 we submitted a joint proposal (Biolmaging UK and the Royal Microscopical Society) to UKRI (BBSRC) for financial support to promote and support Biolmaging UK. As part of this, the RMS supports 50% of a 50% FTE administrative post, to help push forward the goals of Biolmaging UK. This new initiative is helping us to foster relations with UKRI, as well as the Biolmaging community within and outside the RMS.

Biolmaging UK produced a survey on how UK Light Microscopy core facilities are structured in terms of staff, operations, funding, what it tells us nationally about the state of our existing resources and the imaging needs of the scientific community, which fed into UKRI policy (<https://onlinelibrary.wiley.com/doi/10.1111/jmi.13076>). This theme is continuing to be developed further through community meetings, which enables us to provide strong facts and evidence supporting the importance of microscopy.

Facilities Database: The Society has facilitated networking within communities by hosting a list of facilities within the UK (and now expanding to outside the UK). This needs to be actively promoted to encourage sponsorship, and be known as 'the' place to find this information.

International Bodies: The Society is internationally active and efforts are being made to further raise its profile outside of the UK and establish the branding overseas. Engagement with International Bodies is within the role of all members of the Executive Committee who then report back to Council. Many of our members are internationally renowned and can also engage externally in this way. Hosting events for other organisations are also important in terms of impact. Receptions at international events should be held, subject to costs.

Financial Strategy

The Society benefits from previous careful long-term financial management with substantial free reserves. The finances of the Society will always be managed with the view that the Society will exist in perpetuity and should be able to survive economic cycles. The Investment and Reserves Policies will be considered twice-yearly by the Executive Finance Committee and by Council. Where appropriate and when funds permit, free reserves will be used to support new initiatives that are in pursuit of the Society's objectives.

The Society's charitable status brings a number of benefits. The Society's charitable status confirms that the Society exists for the long-term public good. With this comes a position of impartiality and benefits such as not being liable for corporation tax, and partial VAT exemption. The aim is to preserve this status and explore further benefits. The overall Governance management of the Society will follow best-practice as laid down by the Charity Commission and as advised by the Society's auditors. The Council and Executive Committee will take advice regularly (from auditors and other experts) on changes that affect charities and on ways to maximise the potential benefits of this status.

The overall aim of the Financial Strategy is to facilitate the actions that require funding whilst returning a balanced budget each year (excluding those actions that will be funded from reserves). In addition, there is a further aim to reduce the overall reliance on the Journal of Microscopy to pay the Society's "overheads". An overall increase in annual income is necessary if the activities within Outreach are to be funded in-year rather than from reserves.

Initiatives that require significant pump-priming or long-term funding will be deemed to be "Special Projects" and will be funded from reserves. The support of Special Projects will be guided by the Honorary Treasurer and decided by Council.

Given the forecast volatility of the economy during the period covered by this strategy, Council should be particularly vigilant when reviewing the Investment Policy and ask the question "do we have the correct balance between growth and income to match the long-term plans of the Society?"

In summary, the overall aims of the Financial Strategy are to:

- comply with Charity Commission regulations and guidelines;
- manage annual budgets in-line with the wishes of the Executive Committee and Council and in pursuit of the agreed strategy;
- maintain reserves at appropriate levels;
- reduce reliance on income from the Journal by maximising income from other activities;
- release funding to strengthen existing activities and grow new areas that support our objectives.

A commercial arm of the Society to allow income-generating non-primary purpose trading is not currently necessary; November 2013 guidelines show that up to £50K non-primary purpose trading is allowable under charity laws.

Covid-19 Pandemic and the war in Ukraine - Impact and Response

Since March 2020, and the resulting Covid-19 global pandemic, the trustees were naturally concerned about the impact on the employees, members, sponsors and suppliers of the Charity and are assessing what those impacts might be on an ongoing basis. The charity was well placed in terms of business continuity, being ISO 27001 accredited, and initiated several actions to enable RMS staff members to continue working safely, such as working from home and using technology to hold virtual meetings rather than face-to-face meetings. We were able to switch much of our range of Scientific Events and Training courses from March 2020 onwards into virtual events. In December 2020, the Trustees took the decision to cancel mmc2021 as an 'in-person' congress at Manchester Central in July 2021, and this successfully went ahead as a virtual Congress using a bespoke virtual platform. Virtual platforms were being constantly reviewed to provide online training resources and meetings to ensure we continued to meet the needs of our community during this time. We continue to closely monitor the impact of Covid-19 on all of our activities and events and there has now been a gradual return to 'in-person' events from 2022. This has allowed us to develop and use both online and in-person events as part of our suite of activities, and the online events are providing the added benefit of promoting the Society on a Global Scale.

So far, despite the uncertainty around the ongoing impact of Covid-19 and the war in Ukraine on the global economy, the Trustees have been able to manage the Charity through the uncertainty. The charity's bank balances are healthy and our employees have been able to work efficiently from home.

Moving forward, all employees now work on a hybrid basis, working at home and in the RMS office in Oxford.

Actions

EVENTS

Continue to develop and expand our range of meetings and courses, incorporating both face-to-face and virtual meetings. Encourage sections to run joint events, and provide appropriate guidance for staff and organisers to ensure efficient organisation.

Ongoing: actioned by sections, FIGs, Executive. Guidelines to be revisited to help develop more efficient running of events and provide RMS members with clear expectations.

Develop EDI&A strategy

Ongoing: EDI&A policy has been produced and will be regularly reviewed.

Review and refresh training courses, on a regular basis

Ongoing. Training FIG has been renamed as the Professional Development and Training FIG. They are feeding back to the Sections for discussion at Section Chairs Meetings. There is still the need to encourage the organisation of more training courses.

Support BiolmagingUK and develop our relationship with the Research Councils and other funding bodies.

Ongoing Cross-disciplinary and Biolmaging UK meetings and events continue to run, RMS supports BiolmagingUK, has run business voucher schemes for UKRI. We need to continue to be aware of developments at EuroBiolmaging and Global Biolmaging, as well as other national entities starting up that are both an opportunity and competition.

Provide sections, FIGs, Ambassadors and CAB with the opportunity to input into topics and to evaluate future meetings.

Ongoing: Input and feedback obtained for mmc meetings.

Continue to organise Satellite meetings, short courses and events for young researchers and ECR event as part of mmc.

Ongoing: Satellite meetings, short courses and the Early Career/ECR Committee continues to focus on programming/meetings that address the needs of young researchers including the 1-day ECR event held during mmc.

Act as PCO for major microscopy events where appropriate.

Ongoing: RMS acted as PCO for emc2020 in Denmark (cancelled due to Covid-19) and acted as PCO for ELMi2018 (Dublin). Is planning to act as PCO for ELMi2024 (Liverpool).

Keep a careful eye on finances for meetings

Ongoing: Meeting organisers should explicitly consider costs of any meetings they are involved in. This should be included in guidelines.

Organise a meeting in London every two years to showcase microscopy, RMS activities and steer policy.

Ongoing: Events held in September 2016: (Geological Society) and September 2018 (Royal Society). RMS 2022 AGM Meeting took place in London in September 2022 (Royal Society of Chemistry).

MEMBERSHIP - STRUCTURE, RETENTION AND EXPANSION

Continue to increase membership numbers

Ongoing: Membership numbers have plateaued at just under 1500. Ambassadors are starting to be used to promote the society and membership (2019-2020). Membership strategy is being reviewed (2022). Consider how we attract microscopy manufacturing industries (non-trade) as corporate members and what benefits could be introduced for them. Consider introducing Affiliate membership.

Identify ambassadors within centres to help support the RMS and improve communication. Facility Managers would be a good point of contact.

Ongoing: While we have made some progress here (since 2018), we still need to develop this scheme. Ask sections and the office to identify suitable people from our membership list. Advertise for Ambassadors through email/infocus/social media. Use our membership list and sections to identify Ambassadors in industry. Ask them to suggest benefits they'd like to see. We need to engage more with our Ambassadors.

Consider how we attract and keep more junior members, and support ECRs

Ongoing: A new membership scheme was launched in January 2023 with the following categories:

Early Career Membership* (within first five years of paid employment) - £30 per year

Undergraduate Student Membership - FREE

Doctoral Student Membership* - £15.

*50% for developing countries.

The ECR committee (2019) is now well established.

Generate an on-line list of members to enable communication

Ongoing: Must be GDPR compliant, so will be available to members only. Use of a Groups Module on the RMS website is also being explored.

PUBLISHING

Journal of Microscopy

Seek to maintain/improve the Impact Factor.

Ongoing: Impact factor is slowly increasing, now 1.952. Increasing numbers of high-quality papers going forward will help. Diversifying editorial board, editorial board meetings and a

Promote the Journal at RMS and non-RMS events.	push for special issues and reviews will also help.
Switch to online publication only for Infocus .	Ongoing: plan to hold an open journal event at mmc2023 Jan 2023: Online-only publication planned from Jan 2023 (last print version, Dec 2022): links sent to RMS members for new issues. Older issues open to all. (this benefits from working with Pixl8 regarding website/CRM integration)

OUTREACH AND EDUCATION

Maintain number of Microscope Activity Kits at 100	2022: 90 kits available (with funding for up to 100).
Develop outreach activities for secondary schools	Ongoing: Activities continue to be researched and implemented by the Outreach Committee. Assess how newly implemented tabletop SEMs could contribute to this activity.
Develop on-line resources for public outreach for RMS members	Ongoing: Lots of links to useful websites on microscopy and microscopical techniques, and advice/ideas on resources for public outreach were implemented during 2020-21.
Develop Diploma scheme, with potential to develop a chartered Scientist/Microscopist Scheme	Ongoing
Develop ideas for Abbe Letters, handling collection of microscopes and history timelines	Ongoing/in progress via history committee

GOVERNANCE, STAFFING AND INFRASTRUCTURE

Maintain ISO 27001 accreditation, IT systems and website development.	Ongoing: on an annual basis since first successful ISO 27001 audit (February 2016) as well as continuous IT and website assessment.
Engage RMS Staff	Ongoing: Enable and assist staff training and engagement with the sections, needs, etc.
Engage Patrons	Ongoing: Two members of the House of Lords became Patrons – Baroness Finlay of Llandaff and Baroness Brown of Cambridge, Julia King in 2017. Effort is needed to engage them
Ensure 2-way communication with sections	Ongoing: To ensure communication between sections and exec/council. Ask for input on strategy. Circulate updated strategy and ask for input on an annual basis.
Continue to use FIGs and develop as needed	Ongoing.

EXTERNAL RELATIONS: RESEARCH COUNCILS, CDT TRAINING, INTERNATIONAL BODIES

Continue to support BioImagingUK

Ongoing: Grant has been extended, RMS continues to support the post and events.

Identify joint meetings with Facility Operation and Management Focused Interest Group of the MSA

Ongoing: Grace Burke to pursue. Online presentations with key microscopy figures started in 2021.

FINANCE

Explore ways to diversify income streams to reduce the dependence on the Journal.

Ongoing, formed a major part of April 2022 Strategy discussions

Promote RMS services as an event organiser to other organisations.

Ongoing:

Continue to closely review investment and reserves policy to allow for any future reduction in income streams which may be under threat. Build up reserves to cover potential loss of income from the Journal.

Ongoing