Society Publishing Guidelines Creation, Workflows, and Best Practices

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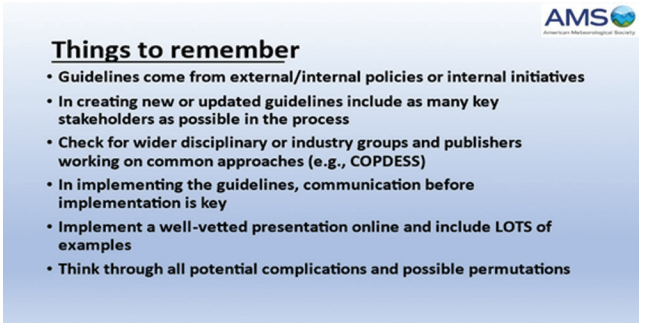

The consideration, development, and implementation of society publishing policies and guidelines is an area that varies greatly based on the culture of the workplace community and the vision of each individual organization. The past 18 months, however, have taught us the value of being flexible and creative, not only in scholarly publishing, but in life. Many associations have had to alter standard work protocols to accommodate a virtual workplace and, for some, that has meant adjusting the existing workflow. Now, with vaccinations readily available and offices reopening, it is a good time to revisit best practices for implementing an efficient and effective workflow and figuring out what will work and what to avoid. This session examined different approaches for the development of publishing guidelines, workflow, best practices, and the challenges around implementation from three perspectives: a small-to-midsize society (American Meteorological Society), a large umbrella society (American Heart Association), and a large society that has been very involved in promoting common approaches across multiple societies (American Geophysical Union).

Moderator Michael A Friedman, Sr Manager for Publishing Operations at the American Meteorological Society (AMS), a small-to-midsize society located in Boston, approaches this topic considering all the constituencies they serve—academia, the public, the private sector, weather enthusiasts—with the understanding that the society needs to support this broad community of 12,000+ in their programming. In creating new or updating existing guidelines from governing policies, AMS includes as many key stakeholders as possible in the planning process. External sources, such as copyright laws, government mandates (i.e., Office of Science and Technology Policy, General Data Protection Regulation) and industry standards, as well as the society's goals, mission, and ongoing internal initiatives all need to be considered when crafting guidelines and shared workflow between the organization's 10 technical journals (mostly hybrid, two Open Access) and member magazine/journal.

The ultimate goal is to align their operations to standard industry practices while streamlining journal processes to shared workflows that implement the society's policy positions, such as the Statement on Full, Open and Timely Access to Data. To accomplish this, they include key stakeholders—editors and senior (and junior) staff, especially those who will be checking compliance. Once developed, implementation of the policies is critical. Final guidelines must be easily searchable and found in locations where authors/editors commonly are, such as submission sites and author instructions, and easily understood and enforceable by staff/editors/authors.

The American Heart Association's (AHA) journals, under the leadership of Vice President Heather Goodell, received over 28,000 papers in 2020. "If process and procedure are not documented, mistakes can happen," she says, which is why her current goal for this midsize publisher is to start "thinking like a big publisher." What exactly does that mean? Continual improvement. Like Friedman, she values outside investigation, asking questions such as: What happened? What variables were in place that allowed it to happen? What processes and procedures exist that are relevant? How do they need to be modified? Who will these changes

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affect? Goodell also leans heavily on continuous proactive internal improvement efforts to consider what happens after relevant data is gathered: Are others doing this differently? Can we get on the same page? Is there an industry best practice? Do we need/can we afford a consultant to help? This approach has helped Goodell and her team tackle problems like standardizing author correspondence so all the AHA journals are handling appeals the same way, refining the decision letter workflow, and commissioning a manuscript workflow across all journals and platforms. The end goal is to evaluate the results of investigations and process improvements and to determine an implementation strategy for recommendations and has three components: 1) approval (Who is the final arbiter?), (2) documentation (Who writes it? Where is it kept and how is it maintained?), and (3) distribution and training (How to ensure a smooth roll out to staff and editors?). Goodell stresses that if the team pays attention to the details, engages the correct stakeholders, and follows these steps, they will have a great foundation for future changes and not have to start from scratch each time they want to modify a process.

For Shelley Stall, Senior Director, Data Leadership, for the American Geophysical Union (AGU), an international, nonprofit scientific association whose mission is to promote discovery in Earth and space sciences, involvement in a community of like-minded researchers and journals is key to meeting their goals. AGU is a participating society in Coalition for Publishing Data in the Earth and Space Sciences (COPDESS), which is a collaboration among research repositories, scholarly publishers, and other stakeholders focused on jointly developing, implementing, and promoting leading practices around the preservation and citation of data, software, and physical samples that lead toward credit and reuse in the Earth, space, and environmental sciences. Through this and other initiatives, AGU has been very involved in promoting common approaches across multiple societies. AGU is also one of 500+ stakeholders and 225 signatories of the Enabling FAIR Data Commitment Statement. A COPDESS project, it requires participating societies to develop specific guidance for data availability and citation that are available in a trusted data repository as well as have knowledge of leading practices and workflows around data citation. The ultimate goal of AGU in working with COPDESS is to provide membership and their journals with information and resources to help their communities be more knowledgeable and prepared to share data (and software) in a way that is relevant and meaningful for each discipline promoting transparency and credit.

While the 3 case studies presented here have very different scopes and approaches, they are united with the whole of scholarly publishing in the goal of arming their journals with information and resources to help their communities be more knowledgeable and prepared to share data in a way that is relevant, easily discoverable, equitable, and meaningful for each discipline promoting transparency and credit.