For Further Consideration…
Follow-up to the April 2008 Report*

Committee on the Future of Print and Electronic Publishing
CFPEP

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Carol Greenhouse, Chair, SLA
Alisse Waterston, Chair, CFPEP, Member, SLA
Lee Baker, Member, SLA

* Report of the Section Liaison Subcommittee (SLA) April 2008
Available online (to AAA members only) at:
http://www.aaanet.org/membership/login_member.cfm
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Background
The section liaison subcommittee was created with the inception of the Committee on the Future of Print and Electronic Publishing (CFPEP) in December, 2006. As an active working group, it formed in the spring, 2007, comprised of Carol Greenhouse (subcommittee chair), Alisse Waterston (CFPEP chair) and Lee Baker (Allocations subcommittee chair). The section liaison subcommittee envisioned the first stage of its work as a combination of questionnaires and interviews among leadership of sections with publications about the goals of their programs and experiences with AnthroSource in aid of informing CFPEP’s forward planning process.

In April, 2008, we issued the Report of the Section Liaison Subcommittee (SLA) Committee on the Future of Print and Electronic Publications CFPEP, conveying it to the Committee on Scientific Communication (CSC) and, simultaneously, to section leadership and the Section Assembly convener. It is available on the AAA website (URL: http://www.aaanet.org/membership/login_member.cfm). Since that time, a number of changes have taken place, both in response to the report and independently, but still relevant to the issues covered in the report. In consultation with Oona Schmid, AAA Director of Publications, we have compiled a digest of updates as of September 30, 2008, in relation to the five key areas identified in the original report as warranting further consideration: AnthroSource (AS) as a resource; Budgets and allocations; Information and communication; Wiley-Blackwell; and Governance. This follow-up report reflects the second stage of our work: to refer issues to specific CFPEP subcommittees, CSC or most relevant AAA staff; and/or to suggest new procedures and practices.

In this document, we present the original itemized list of issues as outlined in the April 2008 Report (Part VII, pages 28-31). Each item is followed by a status update highlighted in a shaded gray box.
I. AS as a Resource

(1) Clarify:

- the long term relationship of AS and Blackwell/Synergy

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AnthroSource is a registered trademark of the American Anthropological Association. AAA’s Dion Dears was recently named Product Manager, Digital Publishing, and is responsible for monitoring the development of AS in accordance with the AAA/Wiley Blackwell contract. Wiley-Blackwell has repeatedly affirmed its commitment to the vision of AS as a portal to “all things anthropology.” Its first major action with regard to AS will occur in December 2008 when AS will “re-launch,” moving to Wiley-Blackwell’s InterScience platform in the first of a two-phase migration project. In terms of long-term implications of the AS and Blackwell/Synergy relationship, it is important to note that according to negotiated terms of the contract, AAA retains ownership of the PDFs and XML wrappers for all content.

- guidelines for sections and interest-groups interested in developing a new electronic presence;
- guidelines for interface between section websites and AS;
- timetables for digitizing archival materials including book reviews;
- functional capacity of AS relative to sound and video, space limitations, publication in languages other than English, as well as other forms of communication outside the journal/newsletter format.

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CFPEP plans to give focused attention to AnthroSource in 2009, and develop AS-related policy recommendations informed by an examination of technological and content possibilities as well as evaluation of the various anthropological stakeholders within and outside of AAA. We will include the 4 items bulleted above on our agenda of AnthroSource-related areas to consider.
(2) Address the specialized indexing issue with sections that regard it as pressing in relation to their mission of outreach to communities outside of academic anthropology.

AAA supports inclusion of publications in Abstracting and Indexing services. Sections interested in pursuing additional specific indexing services should contact Oona Schmid (oschmid@aaanet.org).

(3) Include all sections (even if they are not currently publishing) in communications regarding the development of AS and publications policies, as some have (or may have in the future) active plans for publishing initiatives.

CFPEP is committed to ensuring greater transparency in decision-making and improving communication on AS and publications policies. The following is a list of email communications that CFPEP and the AAA publishing department have sent to section leadership (up to September 30, 2008). This list does not include communications to section leadership from CSC, EB or the AAA Finance Office on publications issues.

CFPEP agrees that Section Leadership would benefit from having a repository of all communications, and has been working with AAA staff members toward encouraging the posting of procedures and documents available to section leaders online.

<table>
<thead>
<tr>
<th>DATE</th>
<th>COMMUNICATION</th>
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<tbody>
<tr>
<td>03/12/2008</td>
<td>“Please See Message from Alisse Waterston and Sally Merry”: Announcement of new allocations formula and attached report on allocations from Kaufman-Wills</td>
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<tr>
<td>03/13/2008</td>
<td>“2007 Downloads”: Attached download figures for the year 2007 for all publications on AnthroSource</td>
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<tr>
<td>04/01/2008</td>
<td>“Procedure to Change Specifications”: Announcement for requests to be submitted and attached new procedure for requesting changes to specifications</td>
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<tr>
<td>04/11/2008</td>
<td>“Please see Message from Alisse Waterston”: Text and attachment on Section Liaison Report</td>
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<tr>
<td>05/05/2008</td>
<td>“Budget-Publishing Royalty Allocations 2009”: Attached allocations formula and values and amounts allocated to each sections</td>
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II. Budgets and Allocations

(1) Communicate the allocation formula in writing (perhaps in the MOU) with a summary of the principles and process that produced it, as well as the process for revising it.

The allocation formula is detailed in all MOUs issued after May 22, 2008.

(2) Most sections are aware that they will gain some security under the WB contract but they lack adequate information about the details; clarify MOU re costs and benefits.

In April of each year, Section Presidents, Treasurers, and Editors will receive a detailed report on costs and revenues for the prior financial year.
(3) Support [innovation and] sections’ efforts to return to long-range planning and programming and coordinate with AAA long-range planning.

**Supporting innovation:**
CFPEP’s Andrea Wiley will host a workshop at the 2008 Annual Meeting that will focus on innovation and growth of publications.

**Supporting long-range planning**
Section long-range planning includes but is not limited to CFPEP’s portfolio in print and electronic publishing. The Publications Office supports sections’ efforts to return to long-range planning, and to see these better coordinated with AAA long-range planning. As a point of information, we would add that the administration of long-range planning is now in flux within AAA. Further updates on this issue will come from AAA as the organizational and procedural issues are clarified.

(4) Review options for supporting individual sections’ initiatives in reaching out to new members as well as potential non-member subscribers, e.g., affiliate membership for individuals.

In exploring further the potential benefits of a new membership category suggested by some section leadership, CFPEP and the section leaders who raised the issue found that the combination of associate membership and individual non-member subscriptions already meets the needs of sections interested in partnering with non-anthropologists in related fields. Elaine Lynch is staff liaison to the Executive Board’s Association Operations Committee (AOC) which makes recommendations about the structure of membership and dues.

(5) Consider a membership survey to learn more, re: aspects of AAA that members understand and value most/least.

The last full membership survey was in the fall of 2005. AAA is been planning to conduct a full membership survey in 2009-2010. Periodically, AAA surveys membership on more specialized topics, such as in August and September 2008 when AAA conducted a survey about AnthroSource and the aaanet.org web redesign in March 2008.
(6) Encourage sections to come forward with questions about their accounting history during the life of the AAA/UCP contract, in particular so they can identify for themselves trends in membership (for their own sections and in relation to others) pre- and post-AS.

When Suzanne Mattingly, AAA controller, shares section finances with Section President(s), Section Treasurer(s), and Editor(s), she also includes the current membership numbers. Typically these reports are issued quarterly; sometimes even monthly.

III. Information and Communication

(1) Revise reporting formats and contents so as to be more user friendly—including clear information on all elements the allocations formula takes into account, as well as clear statements of costs and revenues and their basis.

CFPEP will refer this to the AAA Accounting Department (see also III. 8)

(2) Consider giving sections access to each others’ performance data in relation to the allocation formula. Sections do not seem to regard this as private information.

Starting with 2009 budgeting, Dion Dears has posted all section metrics and allocations to the editors listserv. In April and May 2008, Oona Schmid created benchmark reports that include averages for peer-grouped publications, providing a comparative context. These reports are available from Oona (oschmid@aaanet.org).

(3) Clarify the information flow within AAA so sections know where to go for specific types of information; regularize lines of communication.

CFPEP will refer this to Bill Davis, AAA Executive Director, by requesting an organizational chart or visual aid (with contact information) be posted on the AAA website.
(4) Look for opportunities to deliver information collectively and proactively, so sections have the same information at the same time.

There are several listservs with different AAA departments responsible for communications to each of these lists (e.g., Oona Schmid is in charge of the Editor’s listserv, Kim Baker in charge of the President’s listserv; Suzanne Mattingly, the Treasurer’s, etc.). CFPEP believes there may be benefit to having a resource for section leadership that includes past communications and is working with AAA staff toward this end (See item I. 3).

(5) Use the annual meeting for discussion and deliberation rather than presentations—as this is ordinarily the only opportunity for editors to gather off-line. More structured presentations can be reserved for web, e-mail, teleconferencing. “More discussion improves the discussion.”

For the 2008 Annual Meeting, the editor’s meeting will have two structured agenda items: an update on developments with AnthroSource and an open-forum discussion on the allocations formula. We expect there will be additional time for unstructured discussion. See item (6) below for additional information.

(6) Provide editors with timely opportunities to add new business or discussion items to any meeting agenda, and schedule sufficient time for these.

In September, Oona Schmid invited editors to provide their agenda items for the editor’s meeting at the 2008 Annual Meeting.

(7) Seek opportunities to build organizational trust around timely information and mutually shared values: democratic processes, transparency, mutual accountability and service.

CFPEP and the Publications Office have built in longer timeframes to allow for less urgency and more time for discussion in decision-making.
(8) Prepare a clear user’s guide to the budget reports so leadership can learn the staff’s language, in the interests of improving mutual communication.

CFPEP will refer this to the AAA Accounting Department and request a glossary of terms used in accounting statements, to be distributed with each statement (see also III. 1).

(9) Evaluate the publications office to maximize support for the director and her management resources.

In early 2008, the AAA expanded the Publishing Department by promoting Dion Dears to Project Manager, Digital Publishing, and allowing for the hire of a new assistant. Oona Schmid has asked us to report that she is very pleased with these developments. The new position has made a positive difference in the quality of her working conditions and her ability to effectively manage a complex publishing program.

IV. Wiley-Blackwell

As WB works with individual sections, staff should strive to provide maximum flexibility with regard to journal specifications, recording these in the MOU—as well as clarity in monitoring publications’ performance and advance notice and opportunities for comment on any planned changes in operations or procedure.

Specifications are detailed in the MOU. In 2009, the procedure for requesting changes (effective with the 2010 budget year) to specifications will be announced in early January. The hope is that the new procedure—a longer process with less rush—will be easier to navigate.
V. Governance

1. An internal review of governance (ideally with the help of an external consultant) and the governance structure specifically in relation to the publication program might be timely now, in light of the new by-laws and the AAA/WB contract—especially to assess possibilities for streamlining, clarifying the borders between AAA and WB, and involving section editors as a body in the management of the publication portfolio.

CFPEP works substantively, cooperatively and flexibly with the Publications Department and with CSC. At this time, we are making no recommendations to change the governance structure in relation to the publications program because we feel the current system is working well and functioning smoothly.

2. CFPEP should consider the future of the section liaison, so as to articulate and regularize the selection, function and term of service for this “seat.”

CFPEP’s section liaison “seat” is key to CFPEP’s mission to facilitate information flow and keep pace with developments in the AAA publishing program. The section liaison is a three-year position, appointed from within CFPEP by the CFPEP chair. CFPEP members are appointed by the AAA president. We affirm the importance of the section liaison in relation to CFPEP’s mission and look forward to continuing to work with sections.