



**Canadian Association of Learned Journals  
Association canadienne des revues savantes**

### **VISION**

Our vision is to be the recognized national voice of and advocate for a robust, sustainable Canadian scholarly journal publishing community with internationally recognized high impact journals and the recognized national centre for mentoring, training, and networking to support Canadian scholarly journal publishing.

### **MISSION**

Our mission is to develop a robust, sustainable, independent Canadian scholarly journal publishing community providing Canadian researchers with a viable internationally recognized Canadian publishing option.

We will accomplish this by partnering with funders and stakeholders to deliver

- a) **productive partnerships** with government, academic and scholarly communities
- b) effective national and international **distribution and marketing** arrangements
- c) **highly trained** publishing staff and state of the art publishing technologies
- d) **new business and funding models** (to assure sustainable publishing operations )

## STRATEGIES

Delivering on this mission requires 4 key strategies:

1. Broaden and strength **partnerships** with key funding partners (public and private) and stakeholder groups.
2. Develop **commercial links** critical to the long-term health of Canadian scholarly journals domestically and around the world.
3. Develop leading edge **professional development training programs** for scholarly journal personnel (SJP)
4. Stabilize **funding** for organizational functions and formalize **governance**

## TACTICS

### 1. BROADEN AND STRENGTHEN PARTNERSHIPS WITH KEY FUNDING AGENCIES (PRIVATE AND PUBLIC) AND STAKEHOLDER GROUPS

- Enhance CALJ involvement in and visibility with key organizations with a stake in scholarly research and publishing, including: SSHRC, NSERC, MSERC, CIHR, (funding agencies), ACUP (scholarly publishers), AUCC (university administrators), CAUT (university faculty), CARL (university libraries), CRKN et al. Establish joint working committees where appropriate (e.g. Funding for Scholarly Journal Competition Process), joint information gathering/survey projects
- target selected heads of Canadian Scholarly presses known to support CALJ to seek closer collaboration and their help in spreading the word.
- target a selected number of University Presidents known to support CALJ and provide them with speech modules about CALJ for use in their public comments
- encourage CALJ Board members (and members) to proactively seek speaking opportunities at their respective institutions/faculties etc to raise awareness of the critical role of scholarly journals in disseminating research results.
- CALJ board members should be available to participate in and make presentations at Annual Meetings of each organization and sit on appropriate committees,
- CALJ Members should include CALJ related articles and/or a regular column in their publications,
- CALJ executive should collaborate on joint lobbying efforts both on the Hill and with key federal agencies
- CALJ Board should strike a working committee with representatives from each of these organizations to hold an **Annual Forum** to explore issues of common concern in the scholarly publishing arena

## 2. DEVELOP KEY COMMERCIAL NETWORKS

- Develop and support the **Canadian Scholarly Journal Consortium**-- a journal-controlled aggregation of English language scholarly journals in the SSH-- with the technological and marketing expertise and support to market to libraries both domestically and internationally. ( for more details see Annex A Project description recently submitted to CPF Canadian heritage)

## 3. DEVELOP AND DELIVER LEADING-EDGE PROFESSIONAL TRAINING PROGRAMS

- conduct a training needs assessment to ascertain the training requirements of scholarly editors and journal managers and CALJ staff
- Develop a product line of potential training modules and a pricing strategy with several options
- Test product development and pricing in focus groups to assess appropriateness, and willingness and ability to pay at varying levels
- In collaboration with sponsors and CFHSS, establish a 2 day “**Scholarly Journal Personnel Boot Camp** ” (see Annex B for details) at Congress: costs jointly underwritten by the sponsor and CFHSS with sessions offered by experts from publishing houses, journals etc. Open the school to all Congress attendees charging differential fees for CALJ members and non-members with revenue shared among partners.
- Deliver the Boot Camp in different regions throughout the year as a way to provide SJP with a venue for networking and developing reinforcing synergies

#### **4. STABILIZE FUNDING AND ORGANIZATIONAL GOVERNANCE by:**

##### **A) Developing ALTERNATE revenue streams**

- Formalize sponsorship program and actively seek multiple sponsors both for funds to underwrite Congress costs and other operations e.g. an annual environmental scan of trends in scholarly publishing
- Identify 3-5 foundations and approach them for funds to implement the communications strategy proposed below as well as other activities
- Identify a partner university in Ottawa e.g. University of Ottawa or other organization to provide CALJ E.D. with administrative and IT support, office space and graduate student labour

##### **B) Enhancing CURRENT revenue streams**

- Employ graduate students e.g. to maintain and update prospective members lists and implement a membership drive via email
- Deliver professional training (see below on a cost-recovery basis to members and non-members)
- Review current membership dues and launch membership drive e.g. STM journals

##### **C) Strengthening Organizational Governance & Development**

- Streamline and tighten board member recruitment process starting with a brief but clear statement of member duties and anticipated time commitment, terms of service, including expected Board meeting attendance, committee work and willingness to serve as a proactive ambassador and recruiter for CALJ.
- Recruitment/selection should include a formal interview process led by two sitting Board members and a signed declaration of commitment and confidentiality
- Board members need to demonstrate a willingness to serve as spokespeople and advocates for CALJ identifying speaking opportunities in their respective institutions and areas of expertise to spread the word and recruit
- Establish working committees of the Board closely linked to CALJ strategic priorities and chaired by a Board member i.e. 1) Stakeholder outreach 2) Commercial linkages 3) Professional training 4) Funding/Resources and governance and encourage Board members to sit on at least one committee of collaborating organizations listed in strategic objective 1) above

**STRATEGIC OBJECTIVE:**

**1. Broaden and strengthen partnerships with key funding agencies and stakeholder groups**

**ACTIONS/MILESTONES**

<b>Within next 2 years</b>	<b>OPI</b>	<b>Within next 3 years</b>	<b>OPI</b>	<b>Within next 5 years</b>	<b>OPI</b>
Enhance involvement with:					
AUCC;CAUT;	ED Pres				
		CARL;CRKN	ED Pres		
				ACUP	ED
SSHRC, CIHR,NSERC, MSERC	ED Pres				
				Target scholarly presses	ED Pres
Target selected no. of University Pres	ED Pres				
Speaking opportunities: Annual assocn meetings, newsletters	ALL		ALL		
Joint lobbying	ALL				
Annual Forum with key stakeholder groups	ALL				

**STRATEGIC OBJECTIVE**

**2. Develop Key Commercial Networks**

**ACTIONS/MILESTONES**

<b>Within next 2 years</b>	<b>OPI</b>	<b>Within next 3 years</b>	<b>OPI</b>	<b>Within next 5 years</b>
Develop and support Canadian Scholarly Journal Consortium				
	<b>R Lorimer BOD</b>			

**STRATEGIC OBJECTIVE**

**3. Develop and deliver leading-edge professional training programs**

**ACTIONS/MILESTONES**

<b>Within next two years</b>	<b>OPI</b>	<b>Within next three years</b>	<b>OPI</b>	<b>Within next 5 years</b>	<b>OPI</b>
Conduct training needs assessment	<b>ED</b>				
Develop training modules	<b>ED</b>				
Test and price training programs	<b>ED</b>				
		Deliver SJP Boot Camp at Congress	<b>ED</b>		

**STRATEGIC OBJECTIVE**

**4. Stabilize funding and organizational governance by**

**ACTIONS/MILESTONES**

<b>Within next two years</b>	<b>OPI</b>	<b>Within next 3 years</b>	<b>OPI</b>	<b>Within next five years</b>	<b>OPI</b>
A) Developing alternate revenue streams					
Formalize sponsorship program/seek multiple sponsors	<b>ED</b>				
		Identify 3-5 foundations	<b>ED</b>		
Identify institutional partner in Ottawa area to provide admin and IT support	<b>ED</b>				
B) Enhancing current revenue streams					
Employ graduate students for admin tasks and membership drives	<b>ED</b>				
Launch drive to attract STM journals	<b>ED C Macdonald</b>				
Review membership fee structure	<b>BOD</b>				
Institute cost recovery for professional training	<b>BOD</b>				

C) Strengthening organizational governance and development					
Streamline and tighten board recruitment	<b>BOD</b>				
Establish working committees linked to 4 strategic objectives	<b>BOD</b>				
Board members to sit on committees of partner organizations as in 1) above					

## **ANNEX A**

### **THE CANADIAN SCHOLARLY JOURNALS CONSORTIUM (CSJC) An Outline**

The target client population for the CSJC is Canadian English-language SSH journals using OJS. The objective is to market Canadian scholarly journals to purchasing consortia world-wide.

The CSJC will work in partnership with Erudit to market Canadian scholarly journals in both official languages to both language markets worldwide.

Through collaboration and co-operation, the CSJC and Erudit will strengthen the professionalism and bargaining power of journals to serve Canadian researchers in domestic and international markets.

#### **OPERATING STRUCTURE**

- **Ownership structure:**

a not-for-profit governed by its clients who will sit on the Board of Directors and will have full access to all aspects of CSJC's operations. As the governing body, the Board of Directors will allocate funds received to member journals and to CSJC for its operations.

- **Financial structure:**

a break-even operation from earned revenues.

#### **CLIENT SERVICES:**

Intended mainly for journals that are already publishing their own online versions, hosted in Canada. CSJC will not provide publishing or hosting services but will collect information and inform its clients of cost-effective opportunities.

- **Professional development:**

marketplace knowledge on publishing variables including pricing strategies, usage, development trends.

- **Consulting services:**

technology and marketing assistance to journals

- **Liaison and software evaluation:**

CSJC will work closely with developers of OJS to ensure that journal interests are addressed.

- **R&D:**

CSJC will work with journals, hosting services, and software developers to engage in research and development in aid of maximizing journal usage in and outside the academic community.



## ANNEX B

### The SJP Boot Camp: What it is and Why

#### The Problem:

In an era of rapid and fundamental change in all aspects of the publishing industry, it is crucial that periodical industry personnel acquire and maintain up to date skills and expertise in all aspects of the industry, particularly technology. This is particularly true of scholarly journal editors and managing editors, many of whom are part time and unpaid<sup>1</sup> and, as a result, lack access to ongoing skills development and training.

Failure to adapt to rapidly changing developments in a variety of areas, including on-line publishing, digitization of content and the complexity of copyright issues in a digital age seriously threatens the long-term sustainability of the scholarly journal community in Canada and its ability to maintain and grow its national and international presence.

Practical professional development for scholarly journal personnel (SJP) is commonly delivered by CALJ sister organizations abroad e.g. ALPSP in Britain and SSP in the U.S., but few Canadian personnel can afford the fees and travel costs to attend. No specifically Canadian professional training is currently offered to scholarly journal personnel.

This deprives them not just of the training they need to compete nationally and internationally, but also deprives them of a crucial networking venue where they can exchange ideas on shared issues and problems they confront in publishing scholarly research in a financially sustainable fashion.

---

<sup>1</sup> See latest Industry Data Report, *Scholarly Journal Publishing in Canada, 2010-2011,(2011)*, published by CALJ-ACRS with the financial support of the CPF, Canadian Heritage

**The Solution:**

The **SJP Boot Camp** will deliver a practical two-day training workshop to scholarly journal personnel (both CALJ members and non-members) by leading experts/trainers in their respective fields from across Canada and around the world.

Delivered in partnership with the Canadian Federation of the Humanities and Social Sciences and private sector publishers, the workshop will be offered annually at the Federation's Annual Congress attended by 6,000 - 8,000 academics from across Canada and sold on a cost recovery basis.

It will also be delivered at regional boot camps throughout the year providing, in addition a valuable networking venue way for scholarly journal personnel in different regions of the country.

**OBJECTIVES**

This initiative has 3 goals:

1. To identify the specific training needs of scholarly journal personnel
2. To develop and deliver a two-day workshop comprised of specific training modules designed to address each of the identified training needs gaps
3. To provide a national and regional networking venues for scholarly journal personnel to share issues of common concern and develop productive synergies.

NOTE: a subsidiary objective is to ensure that scholarly journal personnel seeking training have access to the workshop by providing a small number of modest travel/training subsidies.

**RESULTS**

The resulting transmission of practical leading-edge knowledge and expertise to scholarly journal personnel across the country will infuse a new enthusiasm and confidence into the industry, encouraging a belief that Canadian journals can meet and exceed the standards of the best on the international stage.

In an era of mounting international competition --not just on the economic but also on the intellectual fronts -- this renewed confidence and expertise will result in a reinvigorated presence of Canadian scholarship worldwide.

**TIMEFRAME**

The first workshop will be offered at Congress 2012 and annually thereafter. Regional sessions will be delivered throughout 2012-2013. NOTE: timing is contingent on when funds are released by Canadian Heritage.

### **SOURCES OF SUPPORT/FUNDING**

Funding for the initial research and curriculum development is being sought from the Collectives Initiatives Division of the Canadian Periodical Fund at the Department of Canadian Heritage.

This project is supported by the CALJ-ACRS membership who have long pressed for more professional training to be included in the two-day annual CALJ meeting/AGM held annual at Congress. In fact, a recent strategic planning exercise found that professional development and training was at the top of members' priority list with just over half of members seeing it as most important or highly important.<sup>2</sup>

In addition to enrolment fees, CALJ will seek financial support from commercial publishers who could provide expertise in the form of trainers as well as cash in return for brand exposure to a select audience.

---

<sup>2</sup> See *Ensuring a secure future for scholarly journals in Canada: A Strategic plan for the Canadian Association of Learned Journals 2012-2015, (2011)*, published by CALJ- ACRS with the financial assistance of the CPF, Canadian Heritage