



Supporting journals to assess and improve their practices

when using a Library hosted editorial initiative

Library publishing forum 2019
May 10th | SFU Harbour Centre

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Context

- > “The U15 is concerned that the business model that is prevalent among for-profit book and journal publishers may impose undue financial pressure on the research and education ecosystem.” [U15 Statement on Sustainable Publishing 2017](#)

Context



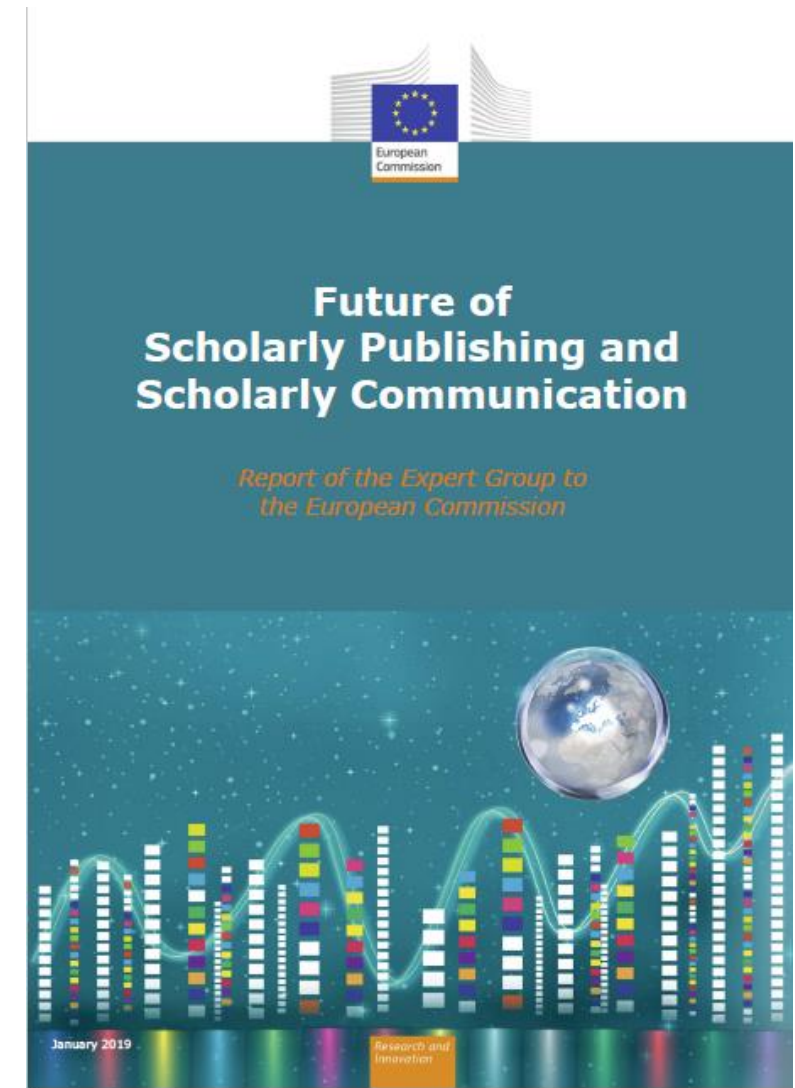
Context (wished)

Canadian Scholarly Publishing Working Group Final Report

JULY 2017

Working Group Member Organizations:

Association of Canadian University Presses
Canadian Association of Learned Journals
Canadian Association of Research Libraries
Canadian Research Knowledge Network
Érudit
Federation for the Humanities and Social Sciences
Ontario Council of University Libraries
Public Knowledge Project
Social Sciences and Humanities Research Council of Canada
Universities Canada



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Context (reality)

- > They operate in an environment of funding cuts and of pressure to make their journals more accessible.
- > The majority of journals still publish a print version along with a digital issue.
- > The financial equilibrium of journals seems to be ensured by this cohabitation of print with online versions

Shaping a Collective Future: An Investigation into Canadian Scholarly Journals' Socio-Economic Reality and an Outlook on the Partnership Model for Open Access (Érudit & CRKN, 2017).



Gray Bridge and Trees. Photo by [Martin Damboldt](#) from [Pexels](#)

Scholarly journals at Université Laval

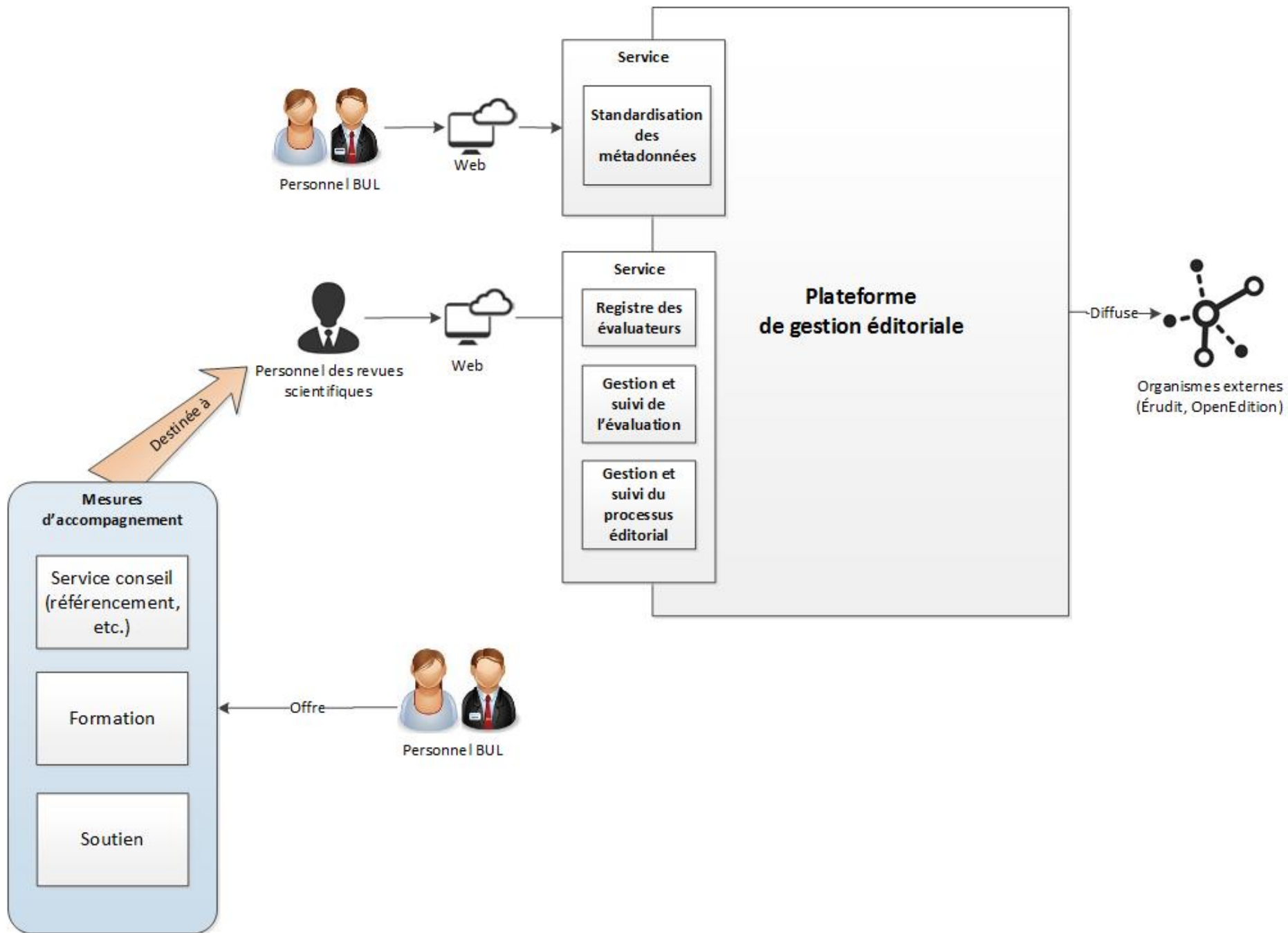
- > Library service started in january 2019
- > ± 30 journals
- > All in Social sciences and humanities
- > Science:
 - Taylor and Francis
 - Wiley-Blackwell



Photo : Francis Bouchard

Scholarly journals at Université Laval

- 1 Platform to manage the editorial workflow
- 2 Coaching and training
- 3 Value added services



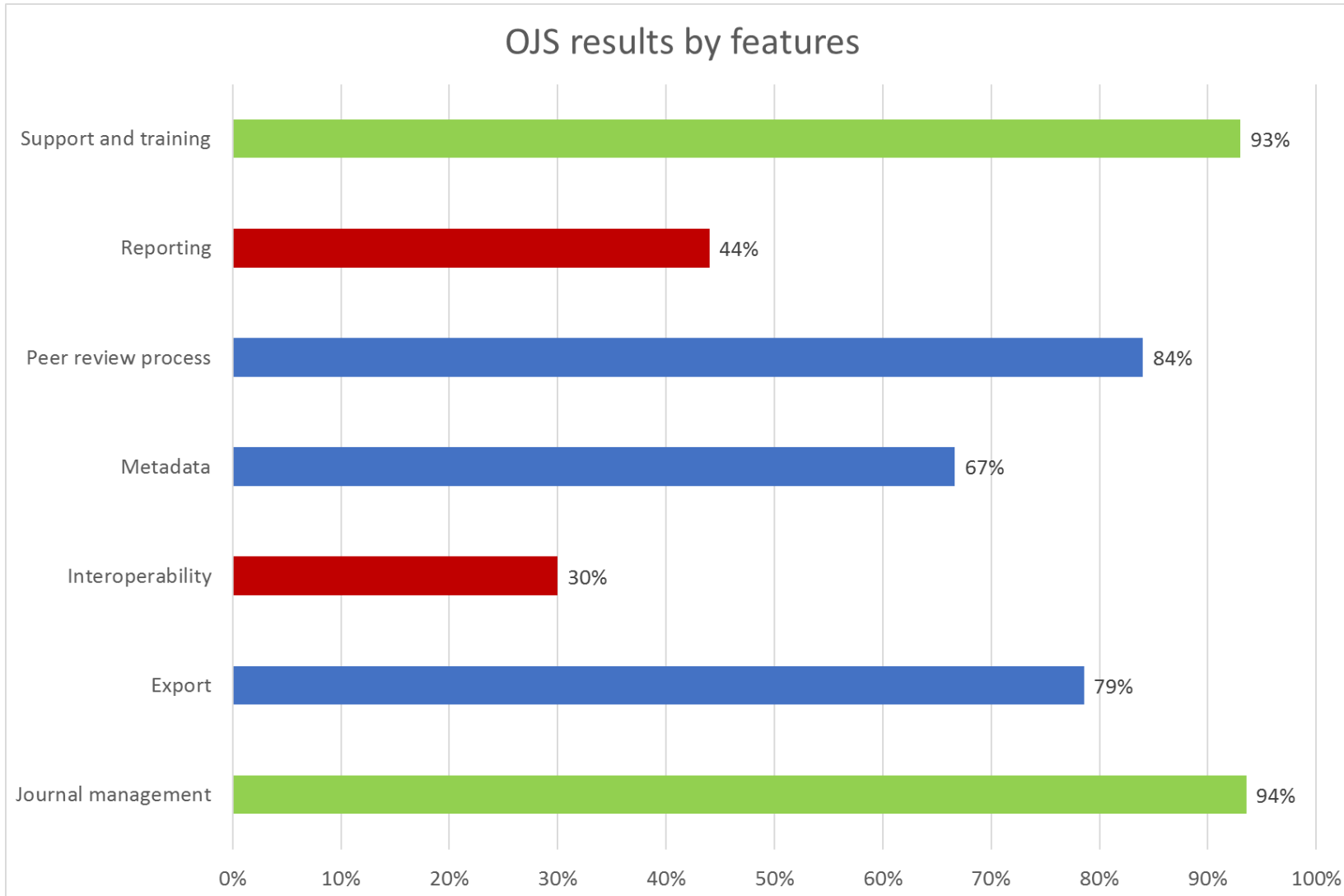
Scholarly journals at Université Laval

- > Building an hosting service *hand to hand* with journals
- > Focus on peer review activities
- > Long term goals:
 - Ease workflow management
 - More time to promote the journal, contribute to science, innovate.

Journals involvement

- > 2016: business analysis, 10 journals selected (well established ; students journals)
 - Individual interviews
- > 2017: software review, 5 journals participate
 - Building a standard Peer review workflow
 - Business requirements (118, 77 mandatory)

Journals involvement



Journals involvement

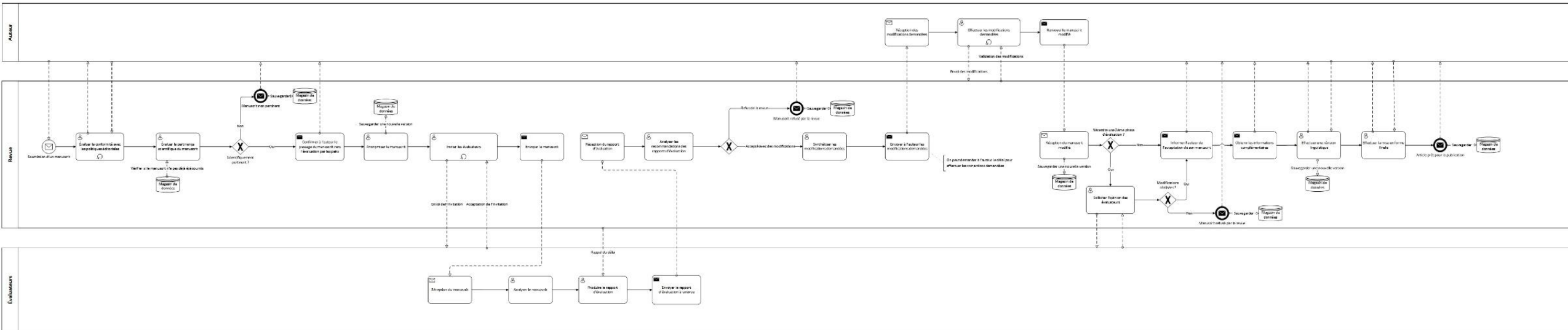
- > 2018: project development, 4 journals involved
 - 5 sprints, invited to demos, opportunities for dialog
 - workshops to define needs (ex: thematic issues, multiple evaluation cycle, public web site)

Journals involvement

- > Main learnings
 - Help secure commitment and adherence from journals
 - Give confidence to Library staff

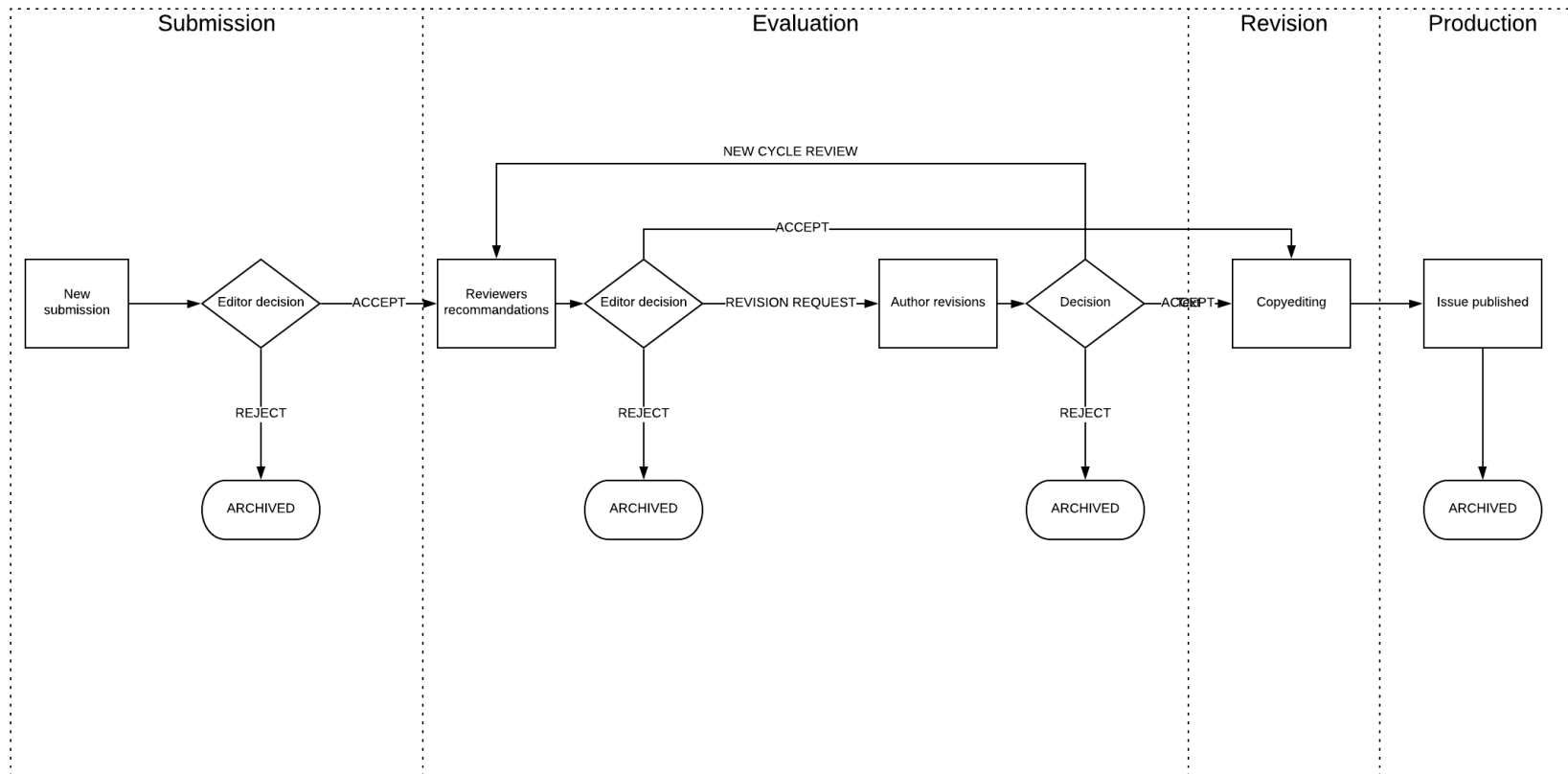
Same workflows, different operations

Processus d'évaluation par les pairs



Same workflows, different operations

OJS simplified editorial workflow



Technology is not enough

- > Journals need more than a technology provider
- > Secure time to assess and discuss current practices.
- > Avoid transposing existing practices into the platform
- > Teach journal staff to become *power user*

Change approach

- > Develop a pilot (November to December 2018)
- > Define the implementation steps
- > Test impacts participation have on journal process

- > Plan as many meeting as needed:
 - 9 were held, 2 to 2½ hours per session

Laval philosophique et théologique

- > 1945
- > Faculté de philosophie
- > Faculté de théologie et de sciences religieuses
- > Issues on Érudit.org
- > Double blind peer review
- > 3 issues per year



Laval philosophique et théologique

- > Journal team:
 - 2 editors for each section of the journal: Theology and Philosophy, in charge of editorial decisions
 - 1 assistant editor: manage all workflows.
 - 1 journal director does not participate in the peer review workflow.
- > All communications (reviewer invitation, response to author, etc.) were managed by the assistant editor

Laval philosophique et théologique

- > Custom made system, crashed in 2017
- > Raw data recovered, but not usable
- > Manual management since then.

Laval philosophique et théologique

- > Complete email rewriting
- > Main change:
 - Editors for Theology and Philosophy take their editorial decision directly on the platform and follow with reviewers and until final acceptance
- > Aspects discussed:
 - When to anonymise articles?
 - Best moment to send the copyright agreement to the author?

Workflow assessment

- > Ensure that journal staff is ready to do so
- > Partnering with journals on campus
 - need a mutual understanding
 - mutual acknowledgement of responsibilities

How to build partnership?

1. Coaching Roadmap
2. Training sessions on peer review management in OJS
3. Participation agreement

Coaching Roadmap

- > Steps to follow to add a journal on the platform
- > High level objectives, passing through all sessions:
 - Identify opportunity to revise workflows.
 - Understand the technology and how to use it as efficiently as possible.

Coaching Roadmap

- > Implementation spread across 1 ½ to 2 months
- > 6-7 sessions (2-3 hours each)
- > Conducted by one librarian

Coaching Roadmap

- > Problem or challenges identified in a session must be solve during next session
 - Through discussions with journal teams
 - Journal director participation streamlines decision process

- > Journal has some homework between sessions
 - Configure review process
 - Write email templates
 - [...]

Coaching Roadmap

Session	Content
Preliminary	Journals needs
Preparatory	Journals operations and workflows

Coaching Roadmap

Implementation sessions	Content
1 st	Editorial process configuration training Explain all workflow configurations
2 nd	Editorial process configuration review Revised with journals all configurations choices
3 rd + 4 th (optional)	Email template writing Write with journals 2-3 key emails templates
5 th	Finalizing implementation Describe Revision and production steps

Training

- > 2 training sessions focusing on peer review workflows
 - Customized based on journal workflow
 - Submission and evaluation step in OJS
 - Staff in charge of editorial decisions (but open to all)
- > Fake journal for the test: *Revue internationale de recherche scientifique*

Training: first part

Activities	Duration
Training plan, journals workflow	20 min
Overview of OJS interface (1/2): <ul style="list-style-type: none">• Editor Dashboard, Submission page	10 min
Peer review workflow	60 min
Overview of OJS interface (2/2) <ul style="list-style-type: none">• Dashboard, workflow tabs	10 min
Test account and questions	10-20 min

Training: second part, hands on

Activities	Duration
Review process simulation <ul style="list-style-type: none">• Journal staff: editors• Library: author and reviewers	1h15
To do and not to with OJS	15 min
Wrap up on important features <ul style="list-style-type: none">• Submission history, upload new file version, Reviewer invitation search page	30 min

Participation agreement

- > Way of sealing the partnership
- > Presented during second roadmap session
- > Define Commitments of each partie
- > Standard agreement between Library and Journals

Being onboard

- > Not just bug reporting
- > Ensure that journal stay tuned with library
- > Regular calls
- > Advise when changing configuration
- > Questions on how to implement a new practice

What's next?

- > Get more journals onboard
 - Objective : 8 after first year.
- > Improve training offer
 - Journal staff is changing sometimes quickly
- > New services planned other than hosting
 - consulting (on copyright, on indexing, etc.)
- > Journal assembly planned after the 1st year of service (2020)
 - discuss and share practices, help prioritize development.

What is difficult in this approach?

- > Resource intensive for both library and journal when starting participation.
- > Require skills that are outside of the standard librarian profile (business analyst, especially for discussion on workflow efficiency)

BUT

Necessary if Libraries wants to be a true force to get back
scholarly communication to universities

Will we help bridging wishes to reality?

“Well, I tried, didn't I? Goddamnit, at least I did that.”

McMurphy/Jack Nickolson in Milos Forman's *One Flew Over the Cuckoo's Nest*

I is a we

This presentation would not have been possible without:

- > Maude Laplante-Dubé, Scholarly Communication, Université Laval Library
- > Guy Bilodeau, Head of Research and Scholarly Communication services, Université Laval Library
- > All library staff involved in the project.
- > Paul Asselin, assistant editor, Laval théologique et philosophique
- > All journal staff from Cahiers de géographie du Québec, Études littéraires, Études internationales, Laval théologique et philosophique that were involved in the project.

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