

2017-2018 AUPresses Research Task Force **Summary of Outcomes and Influence**

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Task Force Roster

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Charge

Research is one of the four key goals in the AUPresses Strategic Plan. Scholarly communications, broadly including all academic journal, book, and alternative digital scholarly output without regard to the publishing entity, appears to be undergoing disruptive change. Within this context, effective data-gathering and analysis are essential if university presses are to advocate effectively for their continued essentiality within the scholarly communications ecosystem, explore new publishing and financial models, and respond responsibly to real or perceived disturbance and reprioritization in both publishing and higher education. The Research Task Force is charged with establishing a research agenda for the association that will enable its members to

1. Measure and communicate the value of their press,
2. Identify and realize opportunities to increase the value of their press, and
3. Recognize and respond to change within publishing and higher education.

Recommendations

The Research Task Force submitted five ambitious and wide-ranging recommendations to the Board of Directors in June 2018:

1. Establish a Business Intelligence & Research Committee
2. Revise and establish a plan to validate the Values of University Presses Statements
3. Establish or support scholarly publishing grants database
4. Assess and revise as necessary AUPresses data collection and distribution strategies
5. Track and share research activities

Many of the recommendations and the work done by the RTF had immediate implications for projects already being pursued or planned by other working groups and committees. The [RTF report](#) also influenced the Board of Directors' revisions to the AUPresses Strategic Plan finalized in February 2019. Below is a summary of the outcomes so far and the continuing influence on important strategic goals and projects of the RTF.

- **Operating Statistics Task Force**

The Association formed a Task Force in mid-2018 with the general charge to "Perform a comprehensive review of the Association's Annual Operating Statistics in order to increase the breadth, depth, and utility of this key member resource." The specific tasks charged to this Task Force reflect the Board's strategic understanding of changing needs around the AUPresses flagship business intelligence program. The goals for the Operating Statistics going forward incorporate elements of the first, second, and fourth RTF recommendations.

- **Business Systems Committee**

The current Business Systems Committee is charged with overseeing several robust data collection programs, including the Operating Statistics, Compensation Survey, and Quarterly Sales & Returns Survey. The current committee charge tasks this group to coordinate with the Operating Statistics Task Force, and to consider other sources of business intelligence. Members of the Board, the Committee, and the wider financial managers community have discussed ways that the purpose of the current committee may need to change to pursue new business intelligence needs of the community.

- **Revised Value of University Presses Statements**

At the time the RTF was looking to the 2001 document of UP Value Statements, the Board had already begun discussing a revision with one of the original authors. Douglas Armato (Minnesota) was able to take up that project in earnest through 2018-19, and a revised set of statements was published in July 2019. The RTF revision, prioritization, and validation recommendations were provided to the working group who authored the revised value statements, and one member of the RTF, Stephanie Williams (Ohio), joined that group.

- **Scholarly Publishing Grants Database**

The Board of Directors considered this recommendation, including its costs and the availability of recommended resources to campus-based members, against other data and research goals and strategic priorities of the Association. This recommendation was tabled.

- **Research Activity Sharing**

The RTF compiled and shared an impressive bibliography of recent research across topics of great interest to AUPresses members—including Open Access, Peer Review, Ebooks, and the Monograph of the Future. The framework of this environmental scan and research sharing will seed the creation of resources within the UP Commons that can leverage community knowledge and ongoing contributions.

- **AUPresses Data Collection**

The Association collects, stores, and distributes a wide and complex array of data about our members. These range from the large amount of information shared in a membership application, to the annual updates submitted to the *Directory*, the Business Systems Committee programs, and both regular and ad hoc surveys developed by committees and task forces. Data is collected via excel workbooks, Survey Monkey, online forms, PDFs, and even email. Data is stored in different formats and cloud servers, and shared to different audiences as reports, charts, workbooks, infographics, or directories. Each area of data collection is being rethought as infrastructure is built, strategic goals refined, and communications plans developed. This includes: the work described above of the Operating Statistics Task Force; in-house review and refinement of a still-new Salesforce database; continuing changes to the annual Directory data collection process (including adding in a place for members to update Institutional Reporting and terminating the biennial separate collection of that data); information architecture planning of the new AUPresses website and evolving UP Commons; and increased guidance to Committee chairs regarding data collection and surveys.

- **Strategic Plan**

The work of the RTF can most obviously be seen in the revised strategies and tactics targeted by the Board under the broader goal of "Research." However, the Task Force influence was also felt in the development of extensive advocacy and external communications strategies, particularly in how we can validate and communicate an accurate picture of the member community.