

# **Report of the Ad-hoc Committee on CMS Publishing Options**

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The CMS has an extensive network of publication activities, overseen by the Publications Committee. The scientific editorial aspects of these publications function smoothly, with a regular cycle for replacing editors and editorial boards. Over the years, the CMS has also built up structures to handle the administrative and technical aspects of publishing, such as administering the publications, managing circulation and advertising, liaising with printers and with other publishers, configuring and mounting digital journals, TeXing and copy-editing manuscripts, circulating page proofs, and a host of related tasks. The structures through which these tasks have been carried out have been designed around a small number of energetic and committed individuals, who have been responsible for these aspects of the publications for significant periods of time (eg. Wright, Doob, Swaminathan, and Jorgenson). It is expected to prove difficult to perpetuate the existing arrangements through to the next generation, once this small group of individuals steps down. In view of the fact that several of these individuals are expected to cease to fill those roles by the end of 2002, the CMS initiated a review of its publishing operations, with a view to charting their possible evolution. The Publications task force (chaired by Keith Taylor) considered aspects of this evolution, as did the Publications Committee (chaired by Jamie Mingo), the Electronic Services Committee (chaired by Edgar Goodaire), and the Ad hoc Camel Review Committee (chaired by Ian Goulden). The issue was then passed for consideration to a subcommittee of the CMS executive committee, consisting of Francois Bergeron, Keith Taylor, and Tom Salisbury.

At the December 2000 CMS meeting, a variety of options were discussed. There was little enthusiasm for simply contracting the publishing operation out, or for maintaining the status quo, which is a highly distributed system, heavily dependant on volunteer labour and on the energy of committed individuals. At the April meeting of the CMS executive, a decision was made to take the next step in the evolution of the CMS's publishing enterprise, and to move to a business model, with a centralized operation and a higher percentage of salaried employees. This will undoubtedly be more expensive than the current model. On the other hand, it is clear that the CMS's profitable publishing enterprise is subsidized by the relatively low-cost buyout arrangements it has been able to secure, as a result of the strong interest key individuals have shown in building this enterprise. That model appears to be unsustainable when it comes to maintaining this enterprise at a professional level.

A centralized publishing office would combine the three legs of the current enterprise, namely the TeX office, the office of the managing editor, and the office of the digital editor. This does not mean that all the tasks would necessarily be carried out in one place. Indeed, the TeX office has shown that some tasks can be farmed out over long distances. It does mean that the individual or individuals with primary responsibility for

overseeing the three legs of the enterprise would be located centrally, with sufficient local infrastructure to direct the operation. The individuals guiding the publications would all be gathered in one location, which is surely a more efficient and renewable model than we currently have.

The following three options for structuring this office are being considered:

1. A publishing office shared with that of one or more of the 3 institutes
2. A publishing office in Ottawa
3. A publishing office in Winnipeg, as an expansion of the existing TeX office.

Note that the Publications task force recommended establishing an associate TeX editor, which can be viewed as a move in the direction of the third option. The feasibility of that option will be reviewed, and may be the subject of a separate report. But the purpose of the current document is to examine the feasibility, advantages, and disadvantages of the other two options.

Either option would allow the publications office to avoid building a completely separate infrastructure for payroll, accounting, office maintenance, etc. since in each case that function could be embedded within the existing infrastructure of either the executive office, or of one of the institutes. As to which of these two options is preferable, the efficiencies that follow from having a single publications office deal with both the CMS publications and with the publications of one or more of the institutes, seems to argue for the first option. The second option, of an Ottawa publishing office is a fallback position that should be explored only if the other options appear to be unfeasible. It seems plausible that any of the three institutes could provide a suitable and stable environment for a publications office. All of them have existing paid staff, and a robust mechanism for perpetuating their operations. CRM and Fields each have well established publishing operations, though neither publishes journals. All three institutes use some infrastructure from their host universities, though Fields actually comes close to operating as an independent business. CRM has significant expertise in bilingual publication, which is potentially of great interest to the CMS. Regardless of where the publishing office is established, the CMS should explore ways of collaborating with CRM in bilingual publication.

Though there are advantages to affiliating with one or more institutes, it must be pointed out that there is also a potential danger to the CMS's national character in doing so. If this should in fact be the ultimate arrangement adopted, efforts would have to be taken to ensure that this partnership did not imperil the CMS's relationships with the other institutes.

For the sake of discussion, here is one possible configuration of a CMS/Institute publications office.

1. **A CMS managing editor.** Probably a mathematician associated with a university located within commuting distance of the Institute. At a guess, this position would consume one day a week. Release time might be a possible mode of compensation.

But this would be difficult to sustain over the long term, and making it a paid position may be the only practical route. This would be the sole position in the publications office that the CMS would have prime responsibility for filling. Filling other positions would be the responsibility of the managing editors, in consultation with the CMS Executive director and with the Institute administration.

2. **A managing editor for the Institute.** Again, this role probably consumes one day a week. A reasonable question is whether these two positions could be combined. We would suggest not. It is in the best interests of both the Institute and the CMS that there is at least one senior individual on-site with undivided loyalty as an advocate for their employer's priorities. Some institutes already have such a position.
3. **A publications manager,** who tracks book manuscripts, corresponds with book authors, and liaises with the CMS executive office and with the Institute administration and payroll/financial officers. This individual would work under both the managing editors, and would cope with those aspects of the journals in the domain of the CMS managing editor. This is likely a full-time staff position. Some institutes already have a part-time position of this nature.
4. **A journals officer.** This would be a part time position, paid entirely by the CMS. The individual would correspond with journal editors and authors regarding manuscripts and proofs, as well as tracking manuscripts sent out for TeXing.
5. **A cohort of TeXnicians.** Some could work out of the publishing office, but others could be dispersed around the country. For example, the current individuals that the TeX office contracts work out to should absolutely be retained. As another example, Fields' current TeXnician works in Oakville and is only occasionally at Fields.
6. **A digital editor.** This would be a paid staff position, shared by the Institute and the CMS, and responsible to the managing editors. The DE would be responsible for guiding and developing the digital publications of both organizations. He or she would work closely with the Institute technical support personnel, and with the Camel manager (Alan Kelm) in Ottawa. The CMS digital publications currently principally involve the journals, while the interest of the Institutes lie elsewhere. But there may be overlap, for example, digital collections of distinguished lectures. While the latter are likely to focus on video rather than print, there are commonalities. Electronic proceedings of Institute conferences are another possible synergy. The DE would do a certain amount of the technical work involved in maintaining the digital operation. Other aspects would be the responsibility of the Camel office in Ottawa, of 3<sup>rd</sup> parties (eg. APURL), or could be handled by hiring additional technical staff, who would work under the DE. Automating many digital functions (eg. mounting new files, especially those of Crux) must be made a priority in order for this to work
7. **A TeX editor.** This position would be shared by the Institute and the CMS. The editor might be an academic, working under similar conditions as a managing editor. Or it could be a part time paid position. This person would be a resource for the TeXnicians, and could solve problematic aspects of submitted TeX files. He/she would develop new styles or adapt old ones as needed, and would stay abreast of innovations in the TeX community. The routine operations of the TeX office would probably not involve this individual, so that in principle he/she could be located anywhere in Canada. One model would be an academic reporting to the managing

editors through the publications manager, and billing the office for hours on a monthly basis.

The existing CMS operation includes salaries for individuals performing many of the above functions. At a guess, the net new cost would be half the salary of the publications manager, as well as a fair market price for the services of the managing editor. The cost of office space would probably be higher than at present, but the costs associated with the TeX editor would be lower, and might balance out. A very rough estimate of the net cost to the CMS for establishing the publishing office, would be \$50,000 per year in addition to current costs. A more realistic budget would have to come out of discussions between the financial officers of the society and the Institute administration. This should be the first order of business if this option is to be seriously explored.

Note that a significant advantage of setting up a centralized office running on a business model is that this structure is ideally suited to taking in contract work from other organizations. In fact, if this model is pursued, and the publishing office is located at one of the institutes, thought should be given to forming a corporation, with the CMS and this Institute as principal shareholders. The corporation would maintain its own set of accounts. This would make the financial delineations clear, which would be crucial if the corporation was to take on contract work for 3<sup>rd</sup> parties. The above staff would be employed by this corporation, with the possible exception of the managing editors (who could however be officers of the corporation). It is reasonable that the other institutes, or other societies (eg. CAIMS, SSC, the Royal Society of Canada) might be sources of contracts for this corporation, especially if the bilingual publishing capacity of the CMS was enhanced or linked to that of the CRM. Note that the TeX office currently has had such contracts, eg. with the Royal Society, and on occasion with CRM. It is possible that the University of Toronto Press (which prints the CMS journals) could use the expertise of the TeX editor as well.