



AMERICAN ACADEMY OF  
ORTHOPAEDIC SURGEONS

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Education Policy: Volunteer Contributor  
Relations

Volunteer Communications: New Policy  
Guideline

Volunteer Communications: New Policy  
Guideline – Editor Checklist

Version Number: 2.0

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This document was written and produced by:  
American Academy of Orthopaedic Surgeons  
9400 West Higgins Road  
Rosemont, Illinois 60018-4976

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## Revision Log

Date	Author	Modifications	Document Version
July 26, 2023	Hans Koelsch	The original policy from December 6, 2014 has been reviewed by the Chair, Education Council, and lead staff. The intended goal and guidance of the policy has not changed: A policy for developing content (publications, online learning programs, videos, and examinations) Changes reflect organizational changes since the first policy was crafted, and the policy has been revised for clarity.	2.0

## 1 Introduction

The AAOS recognizes that orthopaedic surgeon volunteers give generously of their time to develop or contribute content to AAOS publications, online learning, videos, and examinations. AAOS Members volunteer as editors, section editors, or authors (contributors) for book publications, online learning programs, videos, and examination items. The AAOS also realizes that entering into an agreement to produce new educational material for a book, chapter, online learning program, video, or examination is a commitment by the volunteer to dedicate valuable time and effort to achieve the goal of a timely publication. In addition, the AAOS recognizes these volunteer efforts must be weighed against the business aspects of development of these products, including AAOS' contractual obligations to third-party vendors relating to the publication or production of these products. This policy clarifies this volunteer commitment while also weighing the business aspects of creating a timely publication for the Academy and its members and other customers.

## 2 Purpose

The policy describes roles and responsibilities for Academy volunteers and staff working together on the development of new educational content. It is intended to improve communication with contributors and ensure new content is developed following best practices in the industry. It will ensure that new content is created following an agreed-upon schedule of tasks and target project completion date.

## 3 Scope

The policy covers developing content for publications, online learning programs, videos, and examinations. The policy does not apply to AAOS journals, magazines, or newsletters. The policy applies to Editors, Section Editors, Authors, Contributors, and Exam Item Writers.

## 4 Definitions

**Editor.** The Editor (Main Editor or Corresponding Editor if more than one) coordinates with other Editors and Contributors (if any) and is the main contact with AAOS staff to develop the publication.

**Section Editor.** The Section Editor (Main Section Editor or Corresponding Section Editor if more than one for a particular Section) communicates with the Editor, the Section Co-Editors (if more than one) and with the Section's Authors (Corresponding Author/Contributor).

**Author/Contributors.** The Main Author (Corresponding Author) is part of the team of Authors/Contributors (if more than one) of a given chapter and an active participant in the writing of the chapter.

Contributors and authors for online learning and video programs work with Academy staff to produce, record, and edit content.

**Exam Item Writers.** Academy members who are appointed to evaluation committees and receive item-writing training at the commencement of their appointment.

## 5 Right to Modify Policy

The American Academy of Orthopaedic Surgeons reserves the right to modify this Education Policy: Volunteer Contributor Relations at any time. Changes and modifications will be effective when approved and posted.

## 6 Education Policy: Volunteer Contributor Relations

### 6.1 Volunteers and AAOS Staff

The American Academy of Orthopaedic Surgeons (AAOS) policy for developing content (publications, online learning programs, videos, and examinations) is outlined below. The policy does not apply to AAOS journals, magazines, or newsletters.

### 6.2 Introduction

The AAOS recognizes that orthopaedic surgeon volunteers give generously of their time to develop or contribute content to AAOS publications, online learning, videos, and examinations. AAOS Members volunteer as editors, section editors, or authors (contributors) for book publications, online learning programs, videos, and examination items. The AAOS also realizes that entering into an agreement to produce new educational material for a book, chapter, online learning program, video, or examination is a commitment by the volunteer to dedicate valuable time and effort to achieve the goal of a timely publication. In addition, the AAOS recognizes these volunteer efforts must be weighed against the business aspects of development of these products, including AAOS' contractual obligations to third-party vendors relating to the publication or production of these products. This policy clarifies this volunteer commitment while also weighing the business aspects of creating a timely publication for the Academy and its members and other customers.

### 6.3 Publications

**Editor.** The Editor (Main Editor or Corresponding Editor if more than one) coordinates with other Editors and Contributors (if any) and is the main contact with AAOS staff to develop the publication. Responsibilities include keeping the project on schedule as planned and maintaining regular communication with Section Editors (if any) or Authors/Contributors (if no Section Editors are assigned or the Editor needs to communicate to all). The Editor needs to communicate well with staff and Section Editors or Authors and have a strong commitment to the quality and quantity produced and the product's development schedule, as well as good time management skills.

**Section Editor.** The Section Editor (Main Section Editor or Corresponding Section Editor if more than one for a particular Section) communicates with the Editor, the Section Co-Editors (if more than one) and with the Section's Authors (Corresponding Author/Contributor). The Section Editor drives the commitment to and expected quality of the manuscripts and is the first to give feedback to Authors at an early stage in product development. The Section

Editor is also committed to the development schedule and needs to inform Authors and the Editor if situations occur that can affect timely publication, such as overdue manuscripts, overall manuscript quality that does not meet expectations, or the length of the manuscript or the presentation does not match the predetermined outline or content template for the chapter.

**Author/Contributors.** The Main Author (Corresponding Author) is part of the team of Authors/Contributors (if more than one) of a given chapter and an active participant in the writing of the chapter. The Main Author and their co-authors are tasked with following the guidelines provided by staff (content templates) and following common practices of writing style and other guidelines of the publishing industry. See also the [AAOS Information Statement on Recognition for Authoring and Editing Digital Publications](#). The Author needs to communicate proactively with the Section Editor if any questions or concerns arise or if the work cannot be done on schedule.

## 6.4 Online Learning Programs and Video

Contributors and authors for online learning and video programs work with Academy staff to produce, record, and edit content. There may be several contributors to an online learning module or an anthology of videos for a procedure or diagnosis. Each video contributor works with Academy staff to schedule production dates, optimize camera angles for production and plans for narration, and works with staff to complete program editing. All programs undergo a separate peer review process by one or more members who have not contributed to the project.

## 6.5 Examinations

Academy members appointed to evaluation committees receive item-writing training at the commencement of their appointment. Using this specialized training, an item-writing assignment to each committee member is made using the examination blueprint. Members participate in an item review process to ensure thorough review for content accuracy and examination item writing style. Members receive regular communication from the Committee Chair and Academy staff regarding the item-writing assignment and schedule.

## 6.6 Problem-Solving Process

Ideally, all tasks are completed as scheduled; the development process goes smoothly; the writing, initial review, and editing/revisions processes go well; and the expected publication, online learning program, video, or examination meets quality and schedule expectations in advance of the defined product launch date.

However, the Academy realizes that because volunteers often have many commitments, timely completion of the assignment and review/revision may not be possible and thus the

schedule of the product launch may be jeopardized. Also, the expected quality of a chapter, video, or examination items sometimes does not meet expectations or an Editor/Section Editor cannot follow up in a timely manner with the task of reminding Authors or “getting the job done” when it comes to reviewing material at the most critical time. All volunteers who participate in AAOS educational projects are expected to maintain necessary and timely communications with AAOS staff, Editors and other volunteers and to immediately notify AAOS staff if they experience difficulty in working on or completing assigned work on schedule.

As it relates to examinations in production, an examination item writer may fail to complete their entire assignment, write items that were not assigned on the blueprint, write items that are styled incorrectly, or not write at all. In addition, a test item writer may not participate in all required steps or skip one of the steps, such as the Test Item Peer Review. The test item writer also may fail to make adequate time for or fail to participate in the final Panel Review.

**Problem with an Author/Contributor.** The Main Editor, Section Editor, depending on the project, addresses the issue with the Author and tries to remedy the problem within 2 weeks. For a publication, if no satisfying solution can be found or the Author is not responsive, the Section Editor reports the issue to the Editor and suggests a solution. Available options may include:

- a. Finding a new Author;
- b. Assigning a different Main Author;
- c. Dropping the Author and working with the Main Author alone or a reduced team of Contributors; or
- d. Dropping the chapter completely.

Extending the deadline or publication schedule is rarely an option. The Editor shall use good judgment in reviewing the situation and keep AAOS staff informed of the Author and chapter status. AAOS staff may also suggest names of a new Author to replace an Author if necessary. If an Author resigns from the project for any reason, the Section Editor will write a thank-you email to the Author. AAOS staff will invite a new Author on behalf of the Section Editor and inform all participants about the change in authorship as soon as possible. The entire process, from identifying the problem through resolution and notifications, should not take more than 3 to 4 weeks.

With an online learning or video project contributor/author, the project Main Editor/Committee chair works with the Contributor to remedy the problem within 2 weeks. For some projects, patient availability may be the issue and this needs to be taken into consideration. If delays continue, the Main Editor and staff will work to identify other members who might contribute to the project. If a Contributor drops out of or resigns from an online learning or video project, a replacement will be sought immediately. For an examination program, AAOS staff will complete the Committee Appointment Program (CAP)



process in order to replace a committee member. Any delay resulting from the CAP process that may affect schedules must be taken into consideration by the Main Editor and staff as they work to remedy the problem.

**Problem with a Section Editor.** The Editor shall inform AAOS staff about any problems involving a Section Editor and should suggest a solution. Options available may include:

- a. Finding a new Section Editor;
- b. Assigning the role of Main Section Editor to a different person;
- c. Reducing the team of Section Editors; or
- d. Having the Editor assume the duties of the Section Editor.

Dropping an entire Section is generally not a viable option for reasons of marketability and salability.

If a Section Editor resigns for any reason, the Editor will write a thank-you email to the Section Editor. AAOS staff will invite a new Section Editor on behalf of the Editor and inform all participants about the change in Section Editorship as soon as possible. The entire process should not take more than 3 to 4 weeks, recognizing the importance of a Section and that the product launch plan may be delayed.

**Problem with the Editor.** AAOS staff will consult with the Chair, Education Council if there is a problem with the Editor. Ideally, the Chair will reach out to the Editor to find a solution, which may be simply assigning a different Main Editor for that role (if there is more than one Editor). If an Editor resigns from the project for any reason, the Chair will write a thank-you email to the Editor. AAOS staff will invite a new Editor on behalf of the Chair and inform all participants about the change in Editorship as soon as possible. The entire process should not take more than 3 to 4 weeks.

**Problem with Examination Item Writers.** AAOS staff will consult with the Evaluation Committee Chair and/or Chair, Education Assessments and Examinations Committee to contact the volunteer and remedy the situation. If the writer does not complete their entire assignment and/or does not participate in all required steps, the writer will not be awarded up to 10 *AMA PRA CME Credits*. In addition, examination item writers who do not contribute to the item writing process may not be invited back for a second term.

**Volunteer Responsiveness and Resignation.** It is important that volunteers on all levels be responsive to email communication from AAOS and its third-party vendors. If a potential Editor or Author fails to respond to communications from AAOS staff regarding accepting an invitation to participate in a project after two email attempts within a 2-week span, it will be assumed that the person is not interested or is unable to participate. If an Editor, Author, Examination Item Writer, or volunteer in any other role fails to respond to communications by the deadline set for the particular task (manuscript submission, manuscript review, page proof review, or other assigned task), the next-level volunteer (section or book editor, or other assigned role)

and AAOS staff should be notified to assist in contacting that person. If after reasonable attempts by the next-level volunteer and AAOS staff the person still fails to respond, the AAOS will determine (with its third-party vendors, if applicable) how to move the project forward.

## 7 Volunteer Communications: New Policy Guideline

### 7.1 Guideline for Volunteer Editors and Authors Developing Content (Publications, Online Learning Programs, Videos, and Examinations)

This policy guideline describes roles and responsibilities for Academy volunteers and staff working together on the development of new educational content. The Academy adopted this guideline to improve communication with contributors and ensure new content is developed following best practices in the industry. The guideline will ensure that new content is created following an agreed-upon schedule of tasks and target project completion date.

This guideline notes that an *Assignment of Rights* or *Nonexclusive Perpetual License* is received from any volunteer editor or author, along with acknowledgment of receipt of the *Education Policy: Volunteer Contributor Relations*. This guideline also includes an *Editor's Checklist* amendment.

### 7.2 Procedures

1. Academy lead volunteer (council or committee chair) works with Academy staff to identify prospective editors for a specific project; staff will vet editors using criteria such as participation in past Academy projects, overall editorial experience, name recognition, and membership status.
2. Editor is approached by an Academy lead volunteer (council or committee chair), or committee liaison or lead staff on behalf of a lead volunteer, to participate in the development of a specific product. In the following, "Editor" means one or more than one as needed.
3. Editor is chosen first (before any section editors and chapter authors if applicable) and will be charged with the following tasks, supported by staff:
  - Review the statement of scope of the project, which defines the topics and the intended target groups; review the product title; acknowledge the chapter templates and the page limit; monitor the use of the chapter templates and the pages submitted on a manuscript- by-manuscript basis; acknowledge that Editorial Manager® will be used as a (book chapter) manuscript submission and review tool
  - Create or review/update the table of contents (TOC); at this time, editor and staff review their roles and responsibilities for the project using the *Editor's Checklist*;

the TOC will be reviewed by an Academy staff lead before any section editor or author invitations will be sent

- Participate in onboarding meeting with staff (follow-up meetings as needed)
  - Communicate project scope to section editors and/or chapter authors
  - Recommend section editors and/or chapter authors
  - Academy staff will vet any section editor recommendations (or chapter authors if there are no section editors) regarding participation in past projects, any conflicts with concurrent projects, and PubMed record as needed; and advise the Editor on the outcome
  - Communicate with approved section editors and/or chapter authors regarding content and secure commitment to project schedule
  - Review sections and chapters and recommend changes to section editors and/or chapter authors
  - Review final manuscripts
4. Editor has the choice to accept or decline the invitation after review of editor duties.
  5. Editor acknowledges receipt of the Education Policy: Volunteer Contributor Relations.
  6. Staff create the project schedule and informs the editor; the schedule may depend on specific release dates such as the Academy's Annual Meeting or a subspecialty meeting.
  7. Editor specifically assigns rights or provides nonexclusive perpetual license to the Academy (AAOS owns content contribution).
  8. Editor reconfirms their engagement and commitment to the project and schedule in writing (via email). If after review of the schedule the editor finds to be unable to complete their duties, that person can withdraw at that time and inform AAOS, after which AAOS will seek a replacement.
  9. Editor identifies section editors who will identify chapter authors based on the proposed TOC. The Editor develops a list of alternative section editor (and these chapter author) choices if some invitations are declined.
  10. After the editor submits the proposed section editor and author list, it will be vetted by staff. After the proposed section editor and chapter author list has been approved, staff will invite the section editors and chapter authors seeking their commitment and specifically their willingness to adhere to the publication schedule.
  11. Section editors and chapter authors have the choice to accept or decline the invitation.
  12. After all section editors and chapter authors have accepted the initial invitation, the editor will be informed that the invitation process is complete and the final section editor and author list is shared with the editor. Chapter authors may not delegate writing responsibilities to another person.

13. Chapter authors receive their “author packet” (electronic documents) including the TOC with publication schedule, the assignment of rights or nonexclusive perpetual license document to be signed and returned, a copy of the *Education Policy: Volunteer Contributor Relations*, and a copy of the *Guideline for Volunteer Editors and Authors Developing Content* (receipt of both documents to be acknowledged).
14. Editor, section editors, and chapter authors work on their assignment consistent with the project schedule for all contributions (manuscript and revisions). Staff will support the process by communicating specific calendar dates and sending regular reminders asking authors to reply regarding status.
15. Editor communicates with section editors or authors regularly during the development timeline; communicates with staff on progress, and alerts staff when any issues with the project and deadlines arise.
16. Editor participates in an initial onboarding meeting, and follow-up meetings as needed.
17. Editor is responsible for contacting any section editors (section editors are responsible for contacting any chapter authors) regarding lack of responsiveness or missed deadline for project assignment. If a chapter author fails to respond, editor, committee member liaison, and staff enact procedures to replace the author per *Education Policy: Volunteer Contributor Relations*. For examination programs, the CAP is used to replace nonperforming committee members.
18. Staff share regular updates with the Editor; this information may be shared with section editors and chapter authors as a timely reminder of the project schedule, critical deadlines, and any codependency with other content elements important for the project.
19. Staff inform Editor, section editors, and authors when the online/printed product is available and about the option to receive a complimentary copy (online access or printed, if applicable) of the product.
20. Editor receives a thank-you email from the Chair, Education Council.
21. Section editors and chapter authors receive a thank-you email from the Editor.

## 8 Volunteer Communications: New Policy Guideline – Editor Checklist

### *Guideline for Volunteer Editors and Authors Developing Content (Publications, Online Learning Programs, Video, and Examinations)*

- Complete and return assignment of rights form (or nonexclusive perpetual license), including acknowledgment of *Policy* and *Guideline* documents

- Review statement of scope and product title
- Review templates/page limits
- Create or review/update Table of Contents (TOC) and discuss with AAOS
- Receive TOC approval from AAOS
- Recommend section editors to AAOS; AAOS will vet these names before anyone is contacted
- Contact section editors; communicate project scope and schedule
- Confirm section editors, obtain commitment
- Attend Editorial Manager® onboarding meeting
- Receive manuscript submission reminders and follow up regarding late submissions as needed
- Review manuscripts/sections
- Communicate manuscript changes/edits to section editors and/or chapter authors
- Review final manuscripts and page proofs
- Receive notification of publication, with option to receive complimentary copy or copies (online access or print, if applicable)
- Receive thank you email from AAOS
- Send thank-you email to section editors and authors