

Volunteer Communications: New Policy Guideline

Guideline for Volunteer Editors and Authors Developing Publications, Electronic Media, and Examinations

This policy guideline describes roles and responsibilities for Academy members and staff working together on the development of new educational publications. The Academy adopted this guideline to improve communication with contributors and ensure new publications are developed following best practices in the publishing industry. The guideline helps ensure new publications, electronic media programs, and examinations are 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 exchanged and executed between any volunteer editor or author and the Academy, along with mutual acknowledgment of receipt of the *Education Policy: Volunteer Contributor Relations*. This guideline also includes an *Editor's Checklist* amendment.

Procedures:

1. Editor/author (*here: single project author*) is approached by an Academy lead volunteer (committee chair, committee liaison, or staff on behalf of a lead volunteer) to participate in the development of a specific product.
2. Editor(s) is chosen first (before chapter authors) and will be charged and supported by staff with the following tasks:
 - 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 manuscript submission and review tool
 - Build the table of contents (TOC); at this time staff and the editor(s) review their roles and responsibilities for the project using the *Editor's Checklist*; the TOC will be reviewed by an appointed Publications Committee Liaison before any section editor or author invitations will be made
 - Participate in regularly scheduled conference calls with staff
 - Communicate project scope to section editors and/or chapter authors
 - Recommend section editors and/or chapter authors
 - Communicate with section editors and/or chapter authors regarding content and secure commitment to project schedule
 - Review section and chapters and recommend changes to section editors and/or chapter authors
 - Review final manuscripts
3. Editor/author has the choice to accept or decline the invitation after review of editor/author duties.
4. Editor/author acknowledges receipt of the *Education Policy: Volunteer Contributor Relations*.
5. Staff create the project schedule with editor's/author's input; the schedule may depend on specific release dates such as the Academy's Annual Meeting or a meeting of a cooperating specialty society.
6. Editor/author specifically assigns rights or provides nonexclusive perpetual license to the Academy (AAOS owns content contribution).
7. Editor(s)/author reconfirms his or her engagement and commitment to the project and schedule in writing (via email). If after review of the schedule the editor(s)/author finds that he or she is unable to complete his or her duties, that person can withdraw at that time and inform AAOS, after which AAOS will seek a replacement.

8. Editor(s) identifies chapter authors based on the proposed TOC. The Editor(s) develops a list of alternative chapter author choices if some invitations are declined.
9. After the editors submit the proposed author list, it will be vetted by AAOS staff. After the proposed chapter author list has been approved, AAOS staff will invite the chapter authors seeking their commitment and specifically their willingness to adhere to the publication schedule.
10. Chapter authors have the choice to accept or decline the invitation.
11. After all chapter authors have accepted the initial invitation, the editor(s) will be informed that the invitation process is complete and the final author list is shared with the editor(s). Chapter authors may not delegate writing responsibilities to another person.
12. 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 Publications, Electronic Media, and Examinations* (receipt of both documents to be acknowledged).
13. Authors and editor(s) 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.
14. Editor(s) communicate with section editors or authors regularly during the development timeline; communicate with staff on progress, and alert staff early regarding any issues with the project and deadlines.
15. Editor(s) participate in regular conference calls with staff and may invite others as needed (section editors, some key authors, video authors, etc.).
16. Editor(s) are responsible for contacting any section editor or author (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(s), 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.
17. Staff share regular updates with the editor(s)/author; this information may be shared with chapter authors as a timely reminder of the project schedule and the critical deadlines and any codependency with other content elements important for the project.
18. Staff inform editor(s) and authors when the electronic/printed product is available and about the option to receive a complimentary electronic or printed (if applicable) copy of the product.
19. Editor(s)/author receives a thank-you email from the Publications Committee chair directly related to the product.
20. Chapter authors receive a thank-you email from the editor(s) of the product.

Staff may send a survey to section editors/chapter authors to obtain anonymous feedback on the overall process, from solicitation of section editors/chapter authors to the release of the product. The result will help the Academy in its effort to improve its developing processes for new educational content.