

# PKP 2017 - 2021 Strategy

## Vision

To conduct research on, develop open source software for, and provide services in support of, scholarly publishing that extends access and opportunities for research and scholarship on a global scale.

## Values

Our work is guided by our commitment to:

**Quality:**

We achieve excellence through continuous improvement and learning

**Openness:**

We are transparent and share what we develop widely and freely

**Participation:**

We encourage involvement, contributions, and feedback from our community

**Inclusiveness:**

We respect people, value diversity, and actively seek to expand spaces for many voices and experiences, both locally and globally, in and through our work

PKP has played an important role in championing open access for close to two decades, and this commitment will not waiver over the next five years. Through our research program, software development, service expansion, and educational initiatives, we will continue to be part of the movement to attain open access.

# We Do Community-Engaged Research

The Public Knowledge Project was founded in 1998 to foster connections between the knowledge created by the academy and the larger world. At that time, a major barrier to that connection was restricted access to research through print publications and subscription paywalls. As the acceptance of open access expands, new barriers have arisen, such as Article Processing Charges (APCs). Our research continues to identify those barriers and to provide solutions such as freely available publishing platforms like Open Journal Systems and propose models that are not dependent upon APCs. Our research program continues to focus on ways to expand access and build community connections.

**Over the next five years, we will:**

- Conduct research that advances the understanding and acceptance of open access
- Build local publishing capacity
- Develop new tools and services that facilitate open access
- Communicate our research activities and findings widely
- Partner with community-engaged, publishing support organizations, including LOCKSS, ORCID, OASPA, etc.



# We Create User-Centred Open Source Software and Services

Open Journal Systems, Open Monograph Press, and other PKP applications, services and tools are all open source products resulting from our research and feedback from the PKP community. PKP applications have helped over 10,000 publications currently using OJS from around the world, in multiple languages, get up and running, and that collectively represent a global wealth of shared knowledge and a broad diversity of perspectives. We remain committed to providing our community with best in class software that continues to improve and adapt to the changing publishing ecosystem and remains freely available to all.

**Over the next five years, we will:**

- Focus on user needs, accessibility, and usability
- Explore new opportunities for innovation and technological development
- Continue to strengthen our support and enhance our open source applications
- Further pursue a strategy of integration, focusing development effort on core competencies
- Communicate our development plans and activities and solicit community feedback and critiques
- Involve users in our core development work and expand the participation of our developer community



## We Build Community Connections

The successful growth of open access is the result of countless individuals, organizations, libraries, funding agencies, and publishers working toward a common goal. As part of the movement advocating and adopting open access, PKP collaborates with allied organizations, whether they are using our applications and services, developing their own open source applications, undertaking advocacy, or conducting research into new technologies or workflows.

### Over the next five years, we will:

- Listen to and learn from multiple perspectives within the community
- Convene community events, including sprints, workshops, and conferences
- Improve communications about our activities
- Share information about activities of other open access organizations
- Join, contribute to, and actively participate in allied organizations who share our vision

## We Create Community Learning Opportunities

The creation of Open Journal Systems helped create a whole new sector of “scholar-publishers,” who have adopted our free software, built their local journal communities, and increased their publishing skills and self-reliance. PKP recognized this group early on, and quickly expanded our activities from research and software development into technical support, publishing services, education, and community building to help these new publishers thrive.

### Over the next five years, we will:

- Expand learning opportunities offered to our community, including courses, workshops, documentation, and regular resource sharing via social media
- Continue to involve the community in developing our learning resources
- Increase our webinars and related offerings

# We Provide Outstanding Publishing Services

PKP introduced Publishing Services over 10 years ago and our client journals have grown tremendously. In the past 5 years we established a pricing model for hosted services, external support services, and consultation and development work, including a complete redesign and rewriting of the PKP|PS website. We established a ticket service, basic customer relationship management (CRM) workflow, and support triage system. We also expanded our OJS and client services, including article-level metrics, a PKP Index, a PKP LOCKSS preservation mechanism, and Crossref support.

**Over the next five years, we will:**

- Refine the services we provide, and the mechanisms (e.g., websites, conferences, outreach, etc.) we use to promote them
- Focus on improving our internal support infrastructure, including application management and deployment
- Enhance the quality of the non-hosting services we provide, for example the PKP Index and the PLN
- Identify emerging opportunities to extend our software and services to support alternatives in scholarly publishing, such as ALM
- Promote the persistence and long-term preservation of scholarly publishing output
- Revitalize our existing integrated CRM workflows into a single solution for billing, ticketing, task management, and application management



# We Ensure a Sustainable Organization

Continuing our work depends upon creating a sustainable home for PKP. Over the past five years, the SFU Library stepped up to provide a secure base for PKP, providing office space, legal advice, and multiple other forms of in-kind support. Other major contributing partners include the Ontario Council of University Libraries, the University of Alberta, the University of Pittsburgh, and the University of British Columbia. As well, PKP successfully implemented a financial sustainability plan that included community sponsorships, research grants, and paid services, all of which have successfully ensured our ongoing survival and growth.

## Over the next five years, we will:

- Work with SFU and the Library to formalize our relationship
- Build our staff, increase our diversity, and enhance our recruitment and retention strategies
- Offer paid student positions and internships to help develop the next generation
- Continue to work with our committees and interest groups to guide our activities
- Ensure all new activities are vision-driven and adequately resourced
- Grow our sponsorship and development partner programs
- Expand our grant funded activities
- Increase our paid-service revenue

