2016 Training Courses

Planned and delivered by publishers for publishers

www.alpsp.org
## Business & Finance

**Phil Hurst, Royal Society**  
Phil is Publisher at the Royal Society. He is responsible for product development and launch and providing high quality publishing services. Phil has over 20 years’ experience in the publishing industry, both for commercial publishers and learned societies. He was Treasurer of ALPSP between 2002 and 2006 and is Chair of the Training Committee.

**Iain Craig, Wiley**  
Iain is Director of Wiley’s Market and Publishing Analytics department, a global group of analysts who together conduct analytics focused on the library, society, and author communities, using data sets including sales, usage, web-analytics, bibliometrics and altmetrics. Iain has over 15 years experience in the publishing industry having occupied roles at Elsevier, Blackwell Publishing and Wiley.

## Legal

**Siobhain Butterworth, BMJ**  
Siobhain is General Counsel for BMJ. Her previous roles include Legal Director for Guardian News and Media and Readers’ Editor for The Guardian newspaper and website. At BMJ she has responsibility for a broad spectrum of legal projects from licensing to litigation and works with the business at national and international levels.

**Jessica Clark, Elsevier**  
Jessica is Associate General Counsel for Elsevier. She joined Elsevier in 2001 as its first UK lawyer, and now leads a global team of lawyers that provides legal support to Elsevier’s journals business. She is a member of the Publishers Association Publishing Law Group and her previous roles also include in-house lawyer at Penguin Books.

## Content Management & Production

**Janine Burr-Willans, Emerald Group Publishing**  
Janine spent 12 years at Blackwell and when Wiley acquired them, she became Journal Content Management Director where responsibilities were focused on the production of journals. Janine then moved to Emerald, as Chief Officer for Content Management where she has responsibility for the editorial, production and rights departments and the publication of all Emerald content (books and journals) in print and online.

**Genny Early, Taylor & Francis**  
Genny has over 20 years’ experience in STM and academic journal publishing, at Harcourt Brace, Oxford University Press and Taylor & Francis, with responsibility for end-to-end peer review, production services and print/online publishing, workflow management systems, supplier selection and performance management, quality management systems, content enrichment, process improvement, financial management and publishing technology.

## Marketing

**Alexa Dugan, Wiley**  
Alexa is Global Marketing Director for Life Science Journals at Wiley. She manages a team of global marketers who are responsible for developing marketing strategy for the 350 plus life sciences journals published by Wiley. She joined Wiley as a Marketing Manager in 1994 and has worked with books, major reference works, databases and journals in all subject areas from engineering to medical.

**Kathryn Spiller, Bioscientifica**  
Before joining Bioscientifica, Kathryn worked at Taylor & Francis and Informa Healthcare in editorial roles managing, launching and developing a wide range of biomedical journals. She joined Bioscientifica in 2008 and was promoted to Head of Publishing in December 2012. She has since developed a publishing strategy with a strong growth agenda and doubled the publishing portfolio over the last three years and has overall responsibility for marketing and business development.

## Editorial

**Jamie Humphrey, Royal Society of Chemistry**  
Jamie is Publisher at the Royal Society of Chemistry (RSC), and a member of the RSC’s Publishing Management Team, which has overall responsibility for the RSC’s portfolio of journals, books and databases. Jamie has particular responsibility for journals, and the RSC’s North American Editorial Office. He has more than 20 years’ experience in the publishing profession.

**Mark Ryan, Wiley**  
Mark is Vice President, Talent at Wiley, with a background in learning, leadership and organizational development, HR Management and Employee Relations. He has extensive experience of the public and private sector, privatization, mergers and acquisitions, organizational change, business restructure and reorganization.

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**Which level of course is right for you?**

**Level 1**
Aimed at people who are new to their jobs or who have been in them for a short period of time. They are also excellent refreshers for people returning to publishing or changing disciplines.

**Level 2**
Suitable for delegates with some experience in publishing who are now looking to expand their skills.

**Level 3**
Aimed at delegates with several years’ experience in publishing in more specialist, senior or strategic roles.

Read the ‘who should attend’ section for individual courses to see if a programme is suitable for you.
The Association of Learned and Professional Society Publishers (ALPSP) is the international membership trade body that aims to connect, inform, develop and represent not-for-profit scholarly and professional publishers and those that work with them.

Our training programme is devised and delivered by publishers, for publishers. We aim to help organizations develop skilled, informed and motivated staff who are better able to deal with the rapidly changing landscape of scholarly and professional publishing.

Our courses are:
- Updated regularly in line with delegate feedback, changes in the industry and expert advice
- Kept to a maximum of 20 delegates, to ensure a hands-on approach where everyone can participate
- Highly practical – delegates are taught strategies and tactics that can be immediately applied in their jobs
- Tailored to the delegates via a pre-course questionnaire
- Comprehensive: background information and further reading are presented in a delegate pack ensuring depth and breadth of knowledge
- Case studies are drawn from a wide range of disciplines to ensure relevance to all delegates
- Courses are suitable for all size of organization.

If you aren’t able to attend the open course then we’d be happy to discuss running an in-house version for you. Benefits of this type of training and booking details can be found on page nine.

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Try our in-company training as an alternative to the open courses

**General Courses**

**Level 1**

**Introduction to Journals Publishing**

**23 February, 9am-5pm, 41 Portland Place, London**

**5 October, 9am-5pm, Said Business School, Oxford**

**Overview**

This is an essential introductory course covering all aspects of journals publishing for those who are at the beginning of their careers. It covers everything from peer review to online delivery, and provides delegates with a clear understanding of how all the elements in this fast-moving area fit together. Tutors will draw on case studies from their own experience and across all disciplines.

**Programme**

- Roles in journal publishing and types of publishers
- Authors: why they publish, what they want, article types
- Intellectual property
- Publishing ethics
- Subscriptions, licensing and consortia
- Other means of access to content: open access, philanthropic arrangements, pay-per-view, membership models
- Models of open access
- Online journals: publisher sites, aggregators
- Print distribution, fulfilment and customer service
- Marketing
- Measures of success (citation metrics, altmetrics, financial performance)
- Online archiving and repositories; libraries and pricing; the evolving journal.

**Who should attend**

All those new to journals publishing with up to one years’ experience. Particularly relevant to those working in editorial, production and marketing with job titles such as Publishing/Editorial Assistant, Assistant/Associate Editor, Production Assistant, Assistant Production Editor, Assistant Marketing Manager. Also relevant to those in the related departments of sales, subscriptions and customer service; as well as those who have been out of this area for several years and are seeking a refresher.

**Tutors**

**Jon Newbury**

University of London

As Publishing Manager at the Institute of Historical Research, University of London, Jon is responsible for the development and delivery of the School of Advanced Study’s interdepartmental open access publication project. He has worked for a number of academic journals publishers, most recently as Associate Publisher for open access at Elsevier. He holds an MA in Publishing from UCL and acts as an alumni mentor for students interested in publishing.

**Simon Linacre**

Emerald Group Publishing

Simon is an Executive Publisher at Emerald with oversight of Marketing, Accounting, Finance, Economics and Tourism subject areas. He has been with Emerald for 12 years with direct experience in journal acquisitions, open access and business development. His background is in journalism, and he has been published in academic journals on the topics of bibliometrics and knowledge transfer. He holds Masters degrees in Philosophy and International Business and has global experience lecturing to researchers on publishing strategies.

**By the end of the course delegates will be able to**

Understand the role of the editor and editorial office; know what happens to a paper after acceptance; understand how journal finances work; appreciate what goes into a journal marketing plan and how it is executed; understand the difference between the subscription and open access business model, and be aware of some of the threats and opportunities in the future for journal publishers.
Introduction to People Management for Publishing
15 June, 9am-5pm, 41 Portland Place, London

Overview
The first step in people management is often reported as the most challenging. This course aims to give newly appointed managers and those in their first year of managing one or two staff the core knowledge and basic tools to make it a truly rewarding experience. The course will be highly interactive and give participants the opportunity to share experience with peers. Case studies, based on real publishing situations, will be used to develop understanding and skills in applying the tools that are introduced. Participants will also gain an insight into their own personal development priorities and how to achieve them.

Programme
- What is effective people management and why can the first step be so challenging?
- Top 10 common challenges in the first 90 days and the skills first time leaders need to develop fast
- Developing high performance from anyone – what is self-leadership?
- Understanding the individual journey to high performance (and key issues)
- Why leadership and management is changing (rapidly) and what it means to you
- Appropriate management approach and style for your people, today
- Why is the job description a top tool, but often overlooked?
- Engaging your people in achieving your publishing plans
- Outcomes versus activities – the important difference in setting objectives
- Effective delegation and where it starts
- Effective reporting, monitoring and support
- Challenging effectively
- Your development and achieving success in the first year.

Who should attend
This is a one-day course for first-time managers in publishing with one to three staff. Ideally suited for those who are newly appointed or in the first year of managing, although those with greater experience who want to refresh the basics will also benefit.

Tutors
Kate Pearson
Bioscientifica
Kate worked for a number of years at both Taylor & Francis and IOP Publishing in editorial roles managing, launching, acquiring and developing STM journals. Having completed an MA in Human Resources Management, she joined the publishing division of Bioscientifica in 2012 where she is responsible for business development, including new product launches and acquisitions, as well as editorial policy.

Rob Goode
Insight 2 Success Ltd
Rob is a highly experienced consultant with deep insights into strategic performance management and transformation. He is sought for his knowledge and skills in delivering change through performance management, leadership development, employee engagement and team development. His recent experience includes six years as a senior manager leading organization change, and learning and development at IOP Publishing. Now an independent consultant, Rob continues to use his insights and skills to develop outstanding results across a number of organizations and sectors.

By the end of the course delegates will be able to
Use a framework to develop and maintain the performance of your people; understand your own management style and flexibility; understand how to develop and maintain motivation; use and develop the job description to drive job achievement; set better objectives with your people; manage your time effectively; understand some of the current and future management challenges in publishing; and identify your own next development priorities.
Project Management for Publishing

18 May, 9am-5pm, West One, London

Overview

Projects are vital to all publishing organizations to move forward and implement change. Everyone gets involved in them. They may involve developing new products, new processes and systems, adopting new technologies, reaching new markets, acquiring new business, selecting new suppliers or improving existing processes. Projects are also challenging and often fail to achieve the desired results. This course provides those managing projects as well as those working on them with a template and many supporting tools that can be applied to all projects, large or small, to help ensure successful outcomes. It has a strong emphasis on getting things right at the outset because this is where most problems with projects arise. The programme is highly practical and includes break-out sessions using real project scenarios provided by delegates as well as providing publishing case studies as examples of what works and what doesn’t.

Programme

- The need for project management
- Project management overview, principles and life cycles
- Project management methods: starting projects, planning, tracking and controls
- Publishing case studies
- Avoiding failure: managing risk, issues
- Managing change and the people side
- It’s a team game: roles and responsibilities
- Break-out sessions throughout using real publishing project scenarios provided by delegates.

Who should attend

The course will help first time managers and others responsible for managing projects that introduce change in any area within an organization. It will also be suitable for those who are involved in projects as team members. It is relevant to all functions and disciplines within any publishing organization, ranging from large publishing groups to smaller society publishers.

Tutors

Jim Russell
RPM Associates
Jim is a highly experienced project management consultant who runs his own training and consultancy company. He has extensive experience in the publishing industry where he has managed and advised on many projects as well as providing training, coaching and strategic consultancy. He has worked with a broad range of organizations within the publishing sector and continues to be a practising project manager which ensures his training retains a practical and current edge.

Bridget Pairaudeau
IOP Publishing
Bridget has worked for IOP Publishing for 17 years first as a project manager, then programme manager and she is now Head of Programme Office. She has extensive experience of running IT and business change initiatives. Some of her favourite projects have been: the rebuild of the journals publishing platform, replacement of in-house peer review system with ScholarOne and the on-boarding of a significant partner with complex change requirements. Bridget’s project management style varies to suit each project, from traditional waterfall to agile. Whatever the approach her focus is on benefits driven design that delivers real positive change within the organization.

The presenters were incredibly prepared and knowledgeable.
Timea Williams,
Oxford University Press

The combination of methodology, theory and case studies was really useful. Thank you!
Emma Bohan,
School of Advanced Study

By the end of the course delegates will be able to

Appreciate the benefits of a structured, common sense approach to projects; make new projects achievable and manage them with confidence; bring struggling projects back on track; be aware of the ‘people’ and related ‘change’ factors that can undermine projects; bring together cross-discipline teams to achieve success; make a bigger difference!

Follow up telephone & email consultancy support now available

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Try our in-company training as an alternative to the open courses
Disruption, Innovation and Creativity: How to generate and implement new ideas in scholarly publishing

9 November, 9am-5pm, British Library, London

Overview
The rate of innovation in scholarly publishing is accelerating. Researchers need new services for a changing environment and technology now provides a multitude of options to help. But where do you start, what should you do to respond and how can you successfully implement innovative new ideas within your company? This course will allow delegates to reflect on a changing publishing landscape and understand wider drivers of change. Participants will discuss how to scope out and identify what the community really needs, choose new tools and approaches to generate new ideas, understand how to validate these ideas with the audience, and engage with stakeholders and colleagues to build support for new innovations. Case studies and interactive exercises will demonstrate new agile ways to test assumptions, adapt and revise concepts allowing you to identify the best way to implement change and deliver successful new products.

Programme
- Introduction: publishing today
- What is innovation? Incremental versus disruptive and testing what’s real and what’s not
- Practical application of creative techniques including boundary analysis and reversal
- Interactive role and game play exercises
- How to apply techniques for success
- Validation techniques for success with stakeholders
- Implementation and the agile mind set.

By the end of the course delegates will be able to
Understand, research and articulate the need for innovation in your company. Consider the different options for innovation open to you and drive these forward within your organization. Use new tools and techniques apart from traditional brainstorming to effectively general ideas. See these through to leads, scoping, refinement and implementation.

Who should attend
This course is suitable for those working in product development or management with responsibility for owning, developing or directing the strategic vision for a list or product group area, typically at manager level or above. An understanding of scholarly publishing and the wider community is assumed.

Tutors

- **David Smith**
  - The IET
  - After he received his D.Phil from the University of York David decided to trade life as a scientist for a life in publishing. His introduction to scholarly publishing came in the late 90s via Vitek Tracz at Current Science Group and then BioMed Central. He joined CABI in 2001 taking on a variety of roles around innovation. David is currently Head of Product Solutions at the Institution of Engineering and Technology (The IET). He's been proud to sit on the ALPSP Innovation Awards Judging Panel for the last few years. When not involved in scholarly publishing, he likes to indulge in astronomy, tinkering with things, and restoring a 1960 1600 MGA that currently resides in his garage. He's not on Facebook, but he does tweet via @drs1969.

- **Will Russell**
  - Royal Society of Chemistry
  - Will Russell is the Business Relationship Manager at the Royal Society of Chemistry connecting colleagues from all directorates to the technology function ensuring the most efficient and impactful use of resources to achieve and exceed their goals. Previously Will managed the technical development behind the societies Publishing Platform http://pubs.rsc.org. Will has a keen interest in all things digital - particularly the opportunities with new interfaces and technologies and methods of identifying novel and useful new opportunities.

Book online at www.alpsp-training.org or email melissa.marshall@alpsp.org
**General Courses**

**Understanding eJournal Technology**

22 March, 9am-5pm, Said Business School, Oxford  
12 October, 9am-5pm, West One, London

**Overview**

This course will provide an insight into the technologies behind eJournal delivery. Technology has removed the barriers between production, editorial, marketing, sales, customer services and most importantly – the customers. The course will be business-centric – clearly positioning technologies in the context of the industry issues they aim to solve. Participants will learn how technology is used throughout the delivery of eJournals from publisher via library to the end-user.

**Programme**

- How users navigate to eJournal content: introducing the key discovery points for research – features and benefits of resource discovery, journal hosts, publisher websites, aggregators, search engines and library RDS; why librarians purchase access to starting points. Identifying the major players involved in eJournal provision; where do users choose to begin their research?; advances in user navigation; mobile-ready platforms
- How libraries manage e-resources: linking through URL and OpenURL, the development and importance of Link Servers; the role of library web pages, resource discovery services (RDS) and journals management tools used by libraries, including statistics
- Authentication: user authentication methodologies and their limitations: IP address ranges, proxies, Athens, Shibboleth, OpenID and the impact of single sign-on (SSO)
- Planning end-to-end reader navigation that works: from discovery to delivery.

**Who should attend**

Sales, marketing and customer service staff of all levels, senior management who need a refresher course and new technical hires from outside the industry. This course covers technologies that are vital to the delivery of eJournals and therefore need to be widely understood by all departments within the publishing business.

**Tutors**

Simon Inger  
Renew Training  
Simon has worked in the journals industry for over 25 years. He was co-founder and managing director of CatchWord, and previously worked for BH Blackwell. He has provided consultancy to commercial publishers, not-for-profit publishers, libraries and intermediaries since 2002. Particular areas of expertise include pricing, product development, eJournal strategies, and platform and systems selection. Simon is also a co-trainer on UKSG’s E-Resources Technical Update course.

Tracy Gardner  
Renew Training  
Tracy has over 18 years’ experience in marketing and communications and has worked for CatchWord, Ingenta, CABI Publishing and Scholarly Information Strategies. Her career has focused on improving communication channels between publishers, intermediaries and librarians and she understands the business of scholarly publishing from many different perspectives. Tracy is also a co-trainer on UKSG’s E-Resources Technical Update course.

**By the end of the course delegates will be able to**

Gain a business-level grounding in eJournal delivery technologies, gain greater insight into customers’ technical and business requirements and understand the role technology plays in eJournal deployment and discoverability.
ALPSP In-company Training

For a more personal approach to meeting your training needs ALPSP’s in-company training offers convenience, flexibility and cost-effectiveness, wherever you are based.

Benefits of in-house training

1. Cost effective, time saving: Save on the cost of your training and eliminate the need for delegate travel
2. Tailoring: Have the course tailored to your exact needs with case studies and exercises relevant to your team
3. Confidentiality: No loss of in-house confidentiality. Delicate issues can be freely discussed
4. Team building: Share the expertise of your employees and promote team building
5. Flexible and convenient: Mix and match content from several of our courses in a format to suit your needs – full days, half days and webinars.

Small organizations

In-company training can work with as few as five delegates. Get together with other local publishers to make up the numbers. We can put you in touch with other ALPSP members in your area.

What’s included in our in-house package?

Industry recognised instructor, pre-course discussions with our team and the tutor, pre-course questionnaires for the attendees, course tailoring, comprehensive course materials for all delegates, course certificates, as required.

To discuss your requirements please contact Amanda Whiting:
E: amanda.whiting@alpsp.org
T: + 44 (0)1865 247776

It was fantastic, thank you. Natalina was a very good tutor, explained all the concepts in detail, and it was great to have the course conducted in our own office.

The trainer adapted to the organization and delegates with great attention.
Overview

The aim of this workshop is to guide management and business development staff through the required processes and tools needed to assess and prioritize business development opportunities. The course covers the starting point of identifying new business ideas up to the point of delivering a business case for senior management or board level approval. Note that it considers all new business opportunities, including products and services – it is not restricted to the launching of new journals or books.

Programme

- Preparing the ground: systems, data, internal synergies and core competencies
- Quantifying and mapping your concepts: where ideas come from, evaluating ideas and selecting for fit
- Competitor analysis: competing services, companies and working practices
- Examining and defining concepts: narrowing down ideas, market research, partnership
- Building and presenting the case: the idea, the rationale, the risks, the investment and the outline plan.

By the end of the course delegates will be able to

Understand how to determine and define robust business opportunities, how to research and quantify the opportunities and associated risks, and how to prepare a persuasive business case for a new product launch.

Who should attend

The workshop is aimed at business development executives, editorial, marketing or market research staff, and senior managers in smaller organizations responsible for identifying and proposing new product development. It is suitable both for those working in organizations with full business development departments, and also those working solo. Note that the course is discipline-neutral – it is suitable for publishers working in all areas (STM, humanities, etc.)

Tutors

Philip Abrahams
CAB International

Philip has over 30 years’ experience working in business development, having managed publications such as New Scientist magazine, Elsevier Trends journals and the business services of the UK’s Royal Society of Chemistry (RSC). He has launched numerous journals, web services and magazines. He joined CAB International (CABI) in 2009 and a year later led the development and launch of their Plantwise programme, now a global initiative involving 175 partners in over 30 countries. In 2013 Philip’s role changed to lead CABI’s long-term strategic development initiatives, covering areas such as nutrition, mobile services, serious gaming and big data.

Pippa Smart
PSP Consulting

Pippa Smart is a research, communication and publishing consultant, working for her own company, PSP Consulting. She has been in scholarly publishing for over 20 years, working for CAB International, Blackwell (Wiley) and Cambridge University Press. She then became Head of Publishing at INASP, directing initiatives to support research publishers within Africa, SE Asia and Latin America. She specializes in editorial strategies and copyright, and has developed many training courses as well as providing advisory services for journal publishers around the world. She is the editor/author of the monthly ALSP Alert newsletter, and also the Editor-in-Chief of Learned Publishing.
Managing Quality from Outsourced Services
20 July, 9am-5pm, West One, London

Overview
Many publishers are seeking to reduce costs by outsourcing non-core processes to third-party suppliers (either domestically or offshore) in areas such as customer service, subscription processing, peer review management, invoice handling, marketing and production. Using practical case studies, this workshop will identify some of the key skills essential for effective outsourcing (in line with those contained in the National Occupational Standards for Publishing/Outsourcing).

Programme
- Establishing the business case
- Initial research to find your solutions
- Cost-benefit analysis
- Creating and managing Request for Proposals (RFPs)
- Setting up and managing the supplier
- Agreeing and maintaining Key Performance Indicators (KPIs) and Service Level Agreements (SLAs)
- Dealing with cultural differences and remote working (including time zones): cultural values and their impact in everyday business; negotiation and management style; managing suppliers
- Communication: ‘the glue in business’ – how you can communicate more effectively; feedback – both positive and negative; managing deadlines; language
- Managing expectations and assigning responsibilities for both parties
- Agreeing the contract using KPIs and SLAs to manage conflict and problem resolution
- Changing suppliers.

Who should attend
Staff from small to medium sized organizations who need to work with vendors as an adjunct of their regular role. The course is aimed at people relatively new to the role (less than six months) or those more experienced who are now working with offshore vendors and wish to understand what makes them ‘tick’. Suitable across most disciplines and job functions.

Tutors
Kathy Law
Maverick Publishing Specialists
Kathy works for Maverick Publishing Specialists and as such is involved in multiple conversations with multiple publishers (large and small, societies and commercial) and vendors regarding their requirements for support in their platforms, workflows, outsourced sales and marketing and market research. Previously she has worked for platform hosts, technology and fulfilment companies – The Biochemical Society/Portland Press, HighWire, Macmillan Publishing Solutions and Turpin Distribution – all of whom have provided outsourced services for publishers.

Laxmi Chaudhry
Cultural Consultant and Trainer
Laxmi is a cross cultural consultant and trainer, specialising in business effectiveness across international cultures (including remote working, outsourcing and joint ventures). She works with global organizations in many sectors including publishing. Laxmi has worked for the McGraw-Hill companies as Director of Human Resources for UK/Europe (14 countries) and then for the Asia Pacific region (13 countries), based in Singapore. She speaks frequently at international conferences, has published many articles and is a Fellow of the Chartered Institute of Personnel Development. She speaks Hindi, Urdu, Punjabi and Gujarati.

By the end of the course delegates will be able to
Understand how to set up and manage an outsourced supplier, how to establish and maintain agreed quality levels, including problem resolution, and how to build a successful partnership with the chosen vendor(s).

> Relevant across different publishing departments

Book online at www.alpsp-training.org or email melissa.marshall@alpsp.org
Fundamentals of Journals Finance

29 June, 9am-5pm, West One, London

Overview

Can you make any sense of the financial information provided to you? What do all those financial terms mean? This course provides an essential and in-depth look at journal finances with an overview of profitability, revenue streams and expenses. It also examines emerging industry trends such as open access and the impact on journals financial management. This course is specifically for non-finance budget holders new to budget management or those looking to take on responsibility for journals finance.

Programme

- Understanding profit and loss statements
- Producing a journal profit and loss budget
- The balance sheet and cash flow in journals publishing
- Financial ratios and how to analyze journal performance
- Producing a journal forecast when things change
- Emerging trends and their impact on journals financial management
- Producing a five year financial plan for a new launch journal.

By the end of the course delegates will be able to

Produce budgets and forecasts for their journal. Review, analyze and report on the financial performance of journals. Play a leading role in journal financial management. Understand the annual cycle for budget and pricing decisions and understand and better influence a finance director’s perspective.

Who should attend

This course is designed to provide an introductory overview for non-financial managers with responsibilities in journal publishing (e.g. publishing editors, managing editors and marketing managers) or to serve as a refresher for more experienced staff. The course will also be relevant to all publishing staff whose activities impact on overall journal profitability and is suitable for delegates from large and small publishers as well as society owned or listed companies.

Tutors

Kate Rudge
Oxford University Press
Kate is a Commercial Accountant for the Global Academic Business Division of Oxford University Press (OUP). Kate qualified as a chartered accountant and auditor in practice before moving to OUP in February 2011. She spent her initial year at OUP managing a team of accountants, who between them supported all the financial reporting needs of more than 150 society journals. Kate is now responsible for management reporting and budgeting for both academic and journals publishing with a focus on delivering margins.

Oliver Callaghan
IOP Publishing
Oliver is the Group Financial Controller for the Institute of Physics (IOP). He heads up the group finance shared service centre and is part of the senior leadership team at IOP Publishing. Oliver is a qualified accountant and has worked in STM publishing for over 10 years - gaining experience across all aspects of journals finance from launching new titles and business models, through to technical matters such as VAT on international business. Oliver is also Director of IOP Enterprises, IOP’s events company based in London.

Delegates should bring a calculator to this course

Delegates should bring a calculator to this course

Very comprehensive and wide ranging, yet focused and detailed too. A huge amount packed into one day.
Naomi Warren, SAGE Publications

Excellent introduction to journals finance for anyone involved in publishing.
H. Slater, New Phytologist

Delegates should bring a calculator to this course
Journal Metric Analysis and Measuring Impact

26 May, 9am-5pm, QA Middlesex Street Training Centre, London

Overview

Metrics and impact measurement have become an increasingly important part of the scholarly publishing and research landscape. This course covers some of the ways publishers can measure impact and the associated metrics. It is divided between citation metrics, such as the Impact Factor and citation based analysis, and altmetrics looking at a range of tools such as altmetric.com, Impact Story and PlumX. The course also covers usage as a metric and various author and article level metrics such as the h-index. It includes break-out sessions offering extensive hands-on use of the main citation databases and altmetric data – illustrating the types of analysis which can be derived from these data sources.

Programme

- What are journal citation metrics?
- Common misconceptions and problems in the use of citations metrics
- Strategies to maximize citation impact
- Hands on sessions using the most commonly used citation indexes
- What is research impact? Understanding the emergence of altmetrics and the landscape of engagement and research dissemination
- Interpreting altmetrics data: quantitative versus qualitative analysis and understanding the Altmetric Donut scores
- Qualitative analysis of mentions and listening to the conversation around research online
- Hands on sessions using altmetrics data
- Usage data as a metric and the Usage Factor
- Article and author level metrics such as the h-index

Who should attend

Staff working in editorial, marketing, data analyst roles, involved in conducting or presenting the results of citation, altmetric or usage data or analysis. This course is suitable for those with direct responsibility for metrics or two to three years’ wider publishing expertise working in organizations large and small across all subject areas. There is a practical component best suited for those with intermediate Excel skills or similar experience.

Tutors

James Hardcastle
Taylor & Francis
James Hardcastle is the Research Manager at Taylor & Francis where he has worked for the previous seven years specialising in the analysis of bibliometric, altmetrics and usage data. He is responsible for leading the citation and altmetric analysis within the organization and training staff worldwide in this area.

Natalia Madjarevic
Altmetric
Natalia Madjarevic joined Altmetric as Training and Implementation Manager in 2014, where she coordinates the rollout of Altmetric tools with new customers and runs the training programme, including broader outreach and educational activities. Natalia was previously Research Support Services Manager at LSE Library, where she was responsible for open access, bibliometrics activities, research data management and liaison with the Department of Economics. She has worked in a range of libraries including UCL, Queen Mary, University of London and The Guardian. Her professional interests include open access to publicly funded research, using altmetrics to inform and understand research impact and new forms of digital scholarship.

By the end of the course delegates will be able to

Understand and explain common citation metrics such as the Impact Factor; explain inherent differences between journals and their metrics. Comprehend author level metrics such as the h-index and how these can be applied at the journal level. Have a clear understanding of altmetrics and how to use them, know how to identify research receiving attention using various tools and have practical ideas on using altmetrics data. Have an overview of recent COUNTER developments such as the Usage Factor. Have a view on the future direction of metrics and their role in the publishing industry. Several subscription products and free alternatives will be demonstrated.
How to Make Content More Discoverable Through SEO
6 December, 9am-5pm, West One, London

Overview
If you’re producing content for the web and want readers to find your products, you need to understand how to make search optimization work for you. This course focuses on the practical things you can do, explains how search engines work, and equips you with the tools to apply all you have learnt immediately.

Programme
- Why is search engine optimization important? How do our customers search, what words do they use to find content like ours?
- The main international search engines and how they work
- Understanding your analytics
- Overview of latest search initiatives from Google
- What can you do to improve your search optimization?
- How to boost your organic SEO through AdWords and other PPC (pay-per-click) campaigns
- Social media’s contribution to SEO
- Understanding links and SEO: where to get links from, how to find who links to you, and the benefits of a linking strategy
- How working with authors and editors boosts discoverability
- ‘Human optimization’: getting the balance right between writing for spiders and for people. How are customers viewing web content and what do they want? Can we have too many keywords?
- How to measure the effectiveness of your search engine optimization tactics.

Who should attend
Anyone in journal and/or specialist book publishing producing content for the web, typically marketing managers, marketing executives, publishers and commissioning editors, journal editors at learned and scholarly societies and web managers looking for an excellent non-technical overview of SEO applied to publishing.

Tutors
Paul Crabtree
Velo//
Paul is a Director of Velo//, a London-based digital marketing communications agency with media owner clients including Wiley, Informa, Universal Music and The Stage. After starting his career in Informa’s online marketing team, Paul held senior consultancy positions within several large digital marketing agencies all with significant publishing clients, including the leading email service provider Adestra (which serves most of the UK’s largest publishers’ email campaigns).

Rachel Maund
Marketability
Rachel is an international publishing consultant specialising in marketing training, with over 30 years’ practical experience. When not training or consulting, Rachel conducts marketing campaigns for publishing clients. Rachel founded Marketability in 1999 after 18 years working in international sales and marketing roles within academic, STM and professional publishing. She runs most of Marketability’s marketing courses and also tutors for the other UK training providers – Publishing Training Centre, Publishing Scotland, Publishing Ireland, and ALPSP.

By the end of the course delegates will be able to
Have a confident working knowledge and understanding of SEO and their potential contribution to it. Be equipped with practical strategies, including how to use readily available tools to keep up-to-date with new developments.

Case studies and examples will be drawn from book and journal publishing so that delegates will immediately be able to implement their own strategies and crucially be able to explain the importance of these to authors and editorial boards.

Please bring a laptop or tablet along to this course if possible

I had several key practical improvements I could take action on already before the lunch break. The course instructors also found the balance between information and inspiration.

Lauren Danahy, BRILL

Marketing www.alpsp-training.org
Effective Social Media for Scholarly Publishers
28 September, 9am-5pm, 41 Portland Place, London

Overview
Social media now offers the opportunity to reach huge audiences around the globe, but how can publishers effectively harness these new tools to achieve their own objectives? This course aims to help you identify how to integrate social media into the marketing communications, and wider promotional plans of your organization regardless of budget or size of publisher, from setting measurable objectives, to practical tips on what works – and what doesn’t - for different platforms.

Programme
- Setting objectives and measuring results
- Optimising for different channels, using consistent messaging
- Integrating social media activity into marketing and communications planning
- Selecting the right tools
- Understanding the platforms, and how they work
- What works, what doesn’t - including content, timing, wording and platform-specific techniques
- Case studies and examples from the publishing industry and beyond
- Practical activities
- Managing audience interaction
- Achieving successful integration within your organization.

By the end of the course delegates will be able to
Understand how to identify the relevant social media platforms for their audiences, how they work, and what they offer to scholarly publishing organizations. Plan and successfully deliver effective social media campaigns that are integrated into their wider marketing and communications activities. Work effectively within their organization to optimise social media activities.

Who should attend
Anyone in scholarly publishing who is involved in building awareness and recognition for content or their wider organizations. Typically: marketing managers, communications professionals, editorial teams.

Tutors
Kam Arkinstall
Consultant
Kam studied Physics at the University of Oxford, graduating with a Masters in 2007. She then spent five years at Cancer Research UK, working across fundraising and communications. In her next role for a health organization, Kam managed a large rebrand project and worked across multiple marketing channels, including social media. At that time she also started her own walking blog, which now has over 4,000 followers on Twitter. In 2013 Kam joined BioMed Central, taking responsibility for the blog network, social media, and multimedia. Under her guidance, BioMed Central more than tripled the number of visitors to its blog network. Kam recently left BioMed Central and now works as a Senior Consultant at Intelligent Conversation.

Meg Pickard
Consultant
Meg is an independent consultant, working in the areas of digital transformation, engagement and strategy. Her background is in social anthropology: in the mid-90s, she conducted ethnographic fieldwork into community participation first in Bolivia and subsequently online. Since 1998, she has worked as practitioner, strategist and consultant with a range of big-name brands, non-profits and startups, including long stints at AOL Europe and Guardian News & Media. Since 2012, she has been working with a range of organizations mainly in the media and charity sectors, to grow capability, collaborate and communicate with users and help staff become more digital by default. Find her online at megpickard.com and on Twitter as @megpickard.

> Relevant across different publishing departments
Introduction to Journals Marketing

20 April, 9am-5pm, 41 Portland Place, London

Overview
An essential introduction to the changing and challenging role of promoting journals in today’s market, reflecting the sector’s increased emphasis on author and society relationships and on ‘input marketing’ – encouraging high quality and therefore marketable content. Delegates will discuss a variety of promotional channels and put their decision-making to the test by working on a case study.

Programme
- The challenging market for journals: key issues to be aware of, changing models and channels, the roles of authors and societies, of publishers and intermediaries
- Marketing plans: key stages of planning and implementing a promotional plan (setting objectives, identifying the market and appropriate strategies). Selling your plan to editorial boards
- Marketing channels part 1: working with editorial boards, societies and libraries
- Marketing channels part 2: key tactics in the marketing mix, including search engine optimization (SEO), PPC advertising, social media, email marketing, publicity and conferences
- Monitoring results and how to measure success.

Who should attend
Those with new responsibility for marketing journals, whether in a large publishing house where journals are only part of the activity, or a small association publishing primarily for its membership. The contemporary nature of the course also makes it an excellent refresher on best practice in promoting journals today.

Tutor
Rachel Maund
Marketability
Rachel is an international publishing consultant specialising in marketing training, with over 30 years’ practical experience. When not training or consulting, Rachel conducts marketing campaigns for publishing clients. Rachel founded Marketability in 1999 after 18 years working in international sales and marketing roles within academic, STM and professional publishing (including Taylor and Francis, Elsevier, Ashgate, and Gower Publishing). She runs most of Marketability’s marketing courses and also tutors for the other UK training providers – Publishing Training Centre, Publishing Scotland, Publishing Ireland, and ALPSP. She works regularly with companies and publishing associations internationally, notably in Singapore, China, Australia, the US, Mexico, Russia and the UAE.

By the end of the course delegates will be able to
Understand how the marketing mix works most effectively in journals marketing; review and discuss hot topics affecting journals publishing and marketing today; understand the benefits of a good marketing plan, both for sound decision-making and personal time management; develop confidence in working more proactively with in-house and external editors, and apply all you’ve learned in a practical planning case study exercise with other participants.
Effective Journals Marketing

9 June, 9am-5pm, West One, London

Overview
Technology is changing, new business models are developing and new markets emerging – the journal publishing landscape is shifting. These new developments offer challenges for journals marketing. This course provides a strategic overview of this dynamic environment and how best to apply marketing techniques to achieve your journal’s objectives. The workshop will be highly interactive.

Programme
- Changing business models: their impact on marketing
- Changing products: what do customers want?
- Changing customers: new markets, personalization and community building
- Changing organizations: new competitors, branding, positioning
- Marketing to end-users, authors and librarians: key objectives and tactics
- Extending the marketing toolkit: search engines, social media, digital media etc.

By the end of the course delegates will be able to
Understand the environment in which they operate as marketers and the impact this has on their strategies; use the full marketing toolkit in the most effective ways; assess customer needs, and make appropriate changes to their products and marketing messages.

Who should attend
This course is an ideal next step for marketing executives, managers and so on who have attended the ALPSP Introduction to Journals Marketing course or have had several years’ experience of putting these principles into practice but are now looking to expand their marketing skills.

Tutors
Naomi Blumsom
SAGE Publications
Naomi is Group Marketing Manager for Humanities and Social Science Journals at SAGE where she holds responsibility for the marketing strategy of a suite of journals covering several disciplines including Sociology, Cultural Studies, Geography and Urban Studies. She joined SAGE as a Marketing Executive in 2006 and has worked on journals in all major subject areas. Previous publishing roles have included a period as a marketing executive at GMC Publications, a publisher of specialist craft books and magazines.

Emma Watkins
IOP Publishing
Emma is a Marketing Manager for IOP Publishing (IOPP), where she oversees the academic marketing strategy for the entire journals portfolio, as well as community websites, B2B products, and ebooks programme. She started at IOPP as a Marketing Executive in 2011, having previously worked in marketing at the University of the West of England, Bristol, and has extensive experience in new journal launches and re-branding projects, as well as marketing for partner societies. Her specialisms include embedding social media within researcher marketing strategies, creating customer-focused communications, and cutting through the differences between objectives and metrics.

“Easy to understand - could ask questions at any point. Very interactive. Segmented approach really useful. Enjoyed learning from the experts!”
Kate Smith, Maney Publishing

“Great to be able to suggest topics in advance which were heeded. Comprehensive slides and info packs with excellent break-out sessions.”
Mike Hallworth, Wiley-Blackwell

Book online at www.alpsp-training.org or email melissa.marshall@alpsp.org
Journal Development 1: Practical plans for improving journals success

9 February, 9am-5pm, Said Business School, Oxford

Overview

This workshop provides an essential practical introduction to the business of developing journals. The course is highly interactive and participants will undertake realistic exercises to familiarize themselves with methods of evaluating their current journal (or portfolio) and provide ideas on how they can introduce changes. Although familiarity with the scholarly publishing environment is required, part of the course will also involve discussion of the role of journals in today’s research environment and will consider what threats and opportunities exist for current publishing models.

Programme

- Why develop journals: where journals have come from and where they are going; what is the point of journals – who do they serve (and with what); what does development mean, and why do it
- The big picture: changes to content, to the relationships with academia and research, to production and other workflows; working with repositories; different dissemination models – adding value with technology and design; working with communities; changing business models; case study
- Developing a development plan 1, evaluation: where you get your information; using finance and feedback; comparing competitors; pulling it together into something useful (SWOT)
- Developing a development plan 2, objectives: different levels of objectives; identifying the key objective
- Developing a development plan 3, the plan: goals and actions; getting buy-in; reviewing and revising; risk management; case study
- Putting it into action: practical exercise.

By the end of the course delegates will be able to

Implement a system for evaluating their journals and identify areas where changes can be made. At the end of the course delegates will be able to propose and defend their suggested development plans.

Who should attend

This course is aimed at all those responsible for managing and developing one or more journals. Participants should be familiar with scholarly publishing although the course will suit those participants who have only recently taken on development responsibilities. The course is suitable for those working in both small and large organizations, and covers all disciplines (STM, social sciences and humanities).

Tutors

Pippa Smart
PSP Consulting
Pippa Smart is a research, communication and publishing consultant, working for her own company, PSP Consulting. She has been in scholarly publishing for over 20 years, working for CAB International, Blackwell (Wiley) and Cambridge University Press. She then became Head of Publishing at INASP, directing initiatives to support research publishers within Africa, SE Asia and Latin America. She specializes in editorial strategies and copyright, and has developed many training courses as well as providing advisory services for journal publishers around the world. She is the editor/author of the monthly ALPSP Alert newsletter, and also the Editor-in-Chief of Learned Publishing.

Neil Scriven
Oxford University Press
Neil is Head of Mathematics and Physical Science journals at Oxford University Press. He has worked in scholarly publishing for over 25 years covering both production and editorial roles. His current role includes managing and developing a portfolio of titles with a number of high-profile societies. Neil previously worked for IOP Publishing developing some of their flagship physical science publications. This blend of experience has given him a useful insight into the journal development process in both learned society and commercial environments across a wide range of subject areas.

Editorial www.alpsp-training.org

This is an excellent course that catered well to the variety of publishing roles of all present and was well structured in terms of content and delivery.
Jo Alexander, Emerald Group Publishing

Good overview of why develop, and practical ideas of how to go about it. Thanks - a really useful course with good background and practical ideas.
Sarah Walker, ICE Publishing

This blend of experience has given him a useful insight into the journal development process in both learned society and commercial environments across a wide range of subject areas.

Try our in-company training as an alternative to the open courses
**Advanced Journal Development: Strategic development for journal managers**

**16 November, 9am-5pm, West One, London**

**Overview**

This course has been designed as a follow-on from *Journal Development 1* which provides participants with a toolbox system for planning the development of their journals. This more advanced course looks at overarching strategies for journal development including acquisition and portfolio development. The course is built around case studies to allow participants to work on simulated scenarios in order to discuss and test ideas and strategies with their peers and the course facilitators.

**Programme**

- The big picture: globalization; of research and publishing; access models – the implications of repositories and different systems; the influence of non-traditional publishers – removing the middleman?: data and journals – pressure to include and exclude; technology; innovation and new services – who is pushing whom?
- Partnerships and collaboration: contracts, implications, advantages and disadvantages
- Building on strengths and weaknesses: how to identify and resolve weaknesses before they become problematic
- Journal development strategies: list management and title management, new titles – acquiring and launching, closing and selling journals
- Using development to build strategic success: objectives and plans, identifying and bidding for new journals.

**By the end of the course delegates will be able to**

Propose longer-term strategies for developing their organization’s journals – including plans and proposals to develop existing titles and for acquisitions and new launches.

**Who should attend**

This course is aimed at delegates who have experience of managing and developing journals and are looking for a more senior workshop that will examine wider strategic decisions. Delegates will ideally have already taken the ALPSP *Journal Development 1* course, although this is not essential.

**Tutors**

- **Pippa Smart**
  PSP Consulting
  Pippa Smart is a research, communication and publishing consultant, working for her own company, PSP Consulting. She has been in scholarly publishing for over 20 years, working for CAB International, Blackwell (Wiley) and Cambridge University Press. She then became Head of Publishing at INASP, directing initiatives to support research publishers within Africa, SE Asia and Latin America. She specializes in editorial strategies and copyright, and has developed many training courses as well as providing advisory services for journal publishers around the world. She is the editor/author of the monthly ALPSP Alert newsletter, and also the Editor-in-Chief of *Learned Publishing*.

- **Miriam Maus**
  Wiley
  Miriam is currently Director of Editorial Management at Wiley and has over 15 years of experience in academic and educational publishing. She has particular expertise in client management, renewing and winning business, managing diverse teams through periods of change, leading complex global projects, turning strategies into practical actions and building strong internal and external networks.

“Was good for focusing thoughts ready to implement own journals strategy.”

Helen Waller, NETSCC

“The course tutors were engaging and led discussions that got right to the heart of the important issues surrounding publishing strategy and journal development.”

Ellie Gilroy, Taylor & Francis
Learned Publishing is a major international journal, packed with the latest ideas and informed opinion on all aspects of scholarly publishing. Published quarterly, the journal contains original research plus reports on major initiatives and industry developments from around the world.

Recent content includes...

Original articles
- Counterpoints about predatory open access and knowledge publishing in Africa
- Academic publishing career paths – initial research and observations
- On shifting sands: Assessing the financial sustainability of UK learned societies

Industry updates
- Journal Guide: bringing authors and journals together
- ‘Total cost of ownership’ of scholarly communication: managing subscription and APC payments together
- European Publishers Council: making copyright work on the Web

Opinion pieces
- Fair dealing: a concept in UK copyright law
- The promise of post-publication peer review: how do we get there from here?
- Access management: The overlooked but critical enabler

New publishing partnership with Wiley announced for 2016
Publication Ethics: Fraud and misconduct
4 November, 9am-5pm, 41 Portland Place, London

Overview
A wide range of ethical issues can arise in academic publishing. These can be caused by misbehaving authors (e.g. committing plagiarism or fraud), by abuse of editorial positions and also by conflicts between publishers’ and societies’ commercial interests and principles of editorial freedom and integrity. This course will cover how to detect and deal effectively with possible misconduct and show the importance of having sound ethical policies. While the principles and theories covered are applicable across most publication types, some issues covered will be particularly relevant to journals publishing.

Programme
- Editors’ views on ethical issues
- Introduction to publication ethics
- How can misconduct be detected?
- How to deal with suspected misconduct
- Retractions and corrections
- How can publishers’ policies prevent misconduct?

By the end of the course delegates will be able to
Be aware of the main ethical issues that arise in academic publishing, understand how editors view ethical issues, be aware of techniques for detecting misconduct, have greater confidence in handling cases of possible misconduct, understand guidelines relating to misconduct (in particular, the COPE flowcharts and guidelines on retractions), appreciate how publishers’ policies and practices can ensure ethical publishing.

Who should attend
Anybody with an interest in publication ethics, including editorial staff and journal editors. It will be especially relevant to anybody developing or revising their company’s, society’s or journal’s editorial policies or processes.

Tutors
Donna Neill
Consultant
Donna Neill, a solicitor, worked for Wiley for six years, during which time she advised publishing colleagues on copyright issues, publication ethics, libel, publishing contracts and other legal issues relating to academic journals publishing. Donna’s other experience includes three years in the commercial team of a regional law firm, two years in the legal team of a television production company and two years in the editorial team of a legal publisher.

Elizabeth Wager
Consultant
Elizabeth Wager, PhD, is a freelance consultant and trainer who has worked on six continents. She chaired the Committee on Publication Ethics (2009-2012) and is a member of the ethics committees of The BMJ and World Association of Medical Editors. She is a co-author of Good Publication Practice for Pharmaceutical Companies (GPP3), the Wiley-Blackwell Guidelines on Publication Ethics, and various COPE guidelines. She is the author of Getting Research Published: An A to Z of Publication Strategy and How to Survive Peer Review. She is Co-Editor-in-Chief of Research Integrity & Peer Review.

Deborah Owen,
Nutrition Society

Was a very interesting insight and easy to follow and understand - will directly benefit my work. Course material very comprehensive - great having it all together.

Alison Firth,
Royal Society of Public Health
Editorial

Level 2-3

Developing Open Access and Hybrid Journals

10 March, 9am-5pm, West One, London

Overview

The aim of this course is to introduce staff from all areas of journals publishing to the complexities and unique challenges of running an open access journal or journals programme. Delegates will participate in discussion of open access journals and experiment with financial modelling, enabling them to gain an understanding of the necessary steps to take when establishing and maintaining both full and hybrid open access journals.

Programme

- The open access landscape
- Why open access?: market research, subject area differences
- Workflows and best practice: for full and hybrid titles, suggested workflows from author to journal to production to invoicing. Allowing green open access and complying with funding bodies
- Business models including case studies: author charges, memberships, sponsorship, consortia deals, etc
- Setting author charges: including developing countries’ rates and waivers
- Pricing: relating subscription pricing to open access take-up, how to avoid ‘double-dipping’
- Open access launches versus transitioning mature journals: what should be expected in either scenario, including case studies
- Ethics: avoiding vanity publishing, distinguishing editorial decisions from financial decisions. Keeping quality high through the cascade and the mega journal
- Rights, permissions and licensing: different Creative Commons licences, which licence to use, what rights to allow, what is a truly open access licence, what problems arise with open access licences
- Keeping in touch: with the open access community, industry bodies, author relations
- Marketing and branding: how to market an open access journal as opposed to a ‘regular’ title. How to market the open access option on hybrid journals
- Discussion: the future of open access publishing.

Who should attend

This course is aimed at journal publishing managers, publishing editors and publishers interested in developing open access journals or expanding an existing programme. Some prior awareness of the open access industry would be helpful but is not essential.

Tutors

Michael Osuch
Elsevier

Michael is Publishing Director, Neuroscience & Psychology Journals, at Elsevier. He has over 20 years’ experience of launching, managing and developing proprietary and society journals within the medical and biological sciences. He has previously worked at Wiley, Nature Publishing Group and Informa Healthcare.

Vicky Gardner
Taylor & Francis

Vicky Gardner is Open Access Publisher at Taylor & Francis / Routledge (T&F). She has worked for T&F since 2008, when she joined the Environment and Agriculture Journals team. She was appointed to her current position in 2012, following a brief secondment to the T&F Johannesburg office at the end of 2011, during which she mentored colleagues and liaised with co-publishing partners within the region. She works on the development of T&F’s open access policies and systems, consultation with stakeholders and in promotion and advocacy around open access.

By the end of the course delegates will be able to

Appreciate the measures required to create successful open access journals, understand the open access publishing workflow, assess the pros and cons of different open access business models, know the context of the open access industry including the green open access lobby and influential funding bodies, and understand the ethics of open access publishing.

> Relevant across different publishing departments
# Effective Journal Editorial Management

**11 May, 9am-5pm, 41 Portland Place, London**

## Overview

This course introduces the common issues and tasks encountered in journal management. Considering various approaches to effective journal management and relationship building, it enables delegates to build on their skills to be more effective in meeting the day-to-day challenges of journal publishing, changing business models and editorial processes. The emphasis is on practical advice and guidance.

### Programme

- What is effective editorial management?
- Journal development and quality improvement
- Relationships with key stakeholders in journals publishing
- Influencing skills and change management
- Key business issues affecting managing editors and publishers.

### By the end of the course delegates will be able to

Understand stakeholders’ needs and consider ways to establish effective relationships; have an overview of techniques to manage and improve their journals; have gained advice on how to positively influence stakeholders and implement change; have a brief overview of the essentials of the publishing business and how they affect editorial processes and management, such as contracts, copyright and finances; have discussed experiences and shared ideas with their peers.

### Who should attend

This course is aimed at junior managing editors or equivalent editorial personnel, with one to two years’ experience. Staff newly appointed to these positions will also benefit provided they have some previous experience of publishing. It is not suitable for experienced managing editors or publishers with more managerial responsibility. The course tutors present content that is relevant to all subject disciplines. As the editorial role differs between organizations, a questionnaire will be circulated to attendees prior to the course.

### Tutors

- **Rebecca Marsh**  
  GSE Research Ltd/Greenleaf Publishing  
  Rebecca joined GSE Research and Greenleaf Publishing as Publishing Director in 2014. She previously worked at Emerald Group Publishing. She started as a Publisher at Emerald in 1997, became Head of Editorial in 2003, Publishing Director in 2006 and Director of External Relations and Services in 2012. Prior to joining Emerald, she worked at Smith Settle Publishers and the British Journal of Radiology.

- **Ruth Doherty**  
  Nature Publishing Group  
  Ruth is the Managing Editor of both the British Dental Journal and BDJ Open, published on behalf of the British Dental Association by Nature Publishing Group (NPG). She has been based at NPG for the last three years developing the dentistry portfolio. Originally, Ruth was a chemist and she worked with the Royal Society of Chemistry in a variety of publishing roles (production, editorial and journal development) for five years before moving to NPG.

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The course was pitched exactly right and served to affirm much of what I currently do whilst providing great suggestions for improvement and development. A very useful booklet with additional material for reference and further reading. A resource that will sit on my desk!

*Rosie Sheridan, Maney Publishing*
Commissioning Content: Working effectively with authors and editors

21 September, 9am-5pm, 41 Portland Place, London

Overview
This course considers ways in which to develop and manage a commercially successful academic journal and book programme. Taking delegates step-by-step through the commissioning process, it aims to provide practical advice, relevant tips and techniques to commission and solicit successful content and titles – from market scanning and community development through to proposal management and eventual publication. It also considers appropriate financial forecasting models.

Programme
- Commissioning – key activities and considerations
- Commissioning and soliciting content for existing journal titles
- Commissioning a new journal launch title
- Commissioning a new book title – from proposal to publication
- Preparing a proposal, including market scanning techniques and financial planning
- Building effective relationships with authors and editors
- List management and development
- Relationships with key stakeholders in journals and book publishing
- Identifying high-profile authors to target for article content
- Influencing skills and change management
- Key business issues affecting managing editors and publishers.

By the end of the course delegates will be able to
Utilise appropriate market scanning techniques, approach potential new authors and editors with increased confidence, prepare more effective proposals and develop successful lists, analyse and critically evaluate commercial opportunities, manage contracts and schedules effectively and develop techniques to avoid bad decisions.

Who should attend
This course is aimed at commissioning editors and managing editors involved in a new launch programme or book list commissioning role with one to two years’ experience. Staff newly appointed to these positions will also benefit.

Tutors
Mila Steele
SAGE Publications
Mila is Senior Commissioning Editor for Media, Communication and Cultural Studies at SAGE Publications. With over ten years’ experience in academic publishing, she still works across both books and journals. She is experienced in launching journals, applying new business models to journal launches, commissioning original textbooks and bestselling new editions, getting the best out of authors and creatively managing the transition from print to online.

Merlin Fox
World Scientific Publishing
After a spell in environmental science research, Merlin began his publishing career as an assistant editor at the Royal Society of Chemistry in 2004. He moved to the RSC books department in 2006, and aside from commissioning books was also involved in the RSC eBook programme, and a series of visits to university libraries across the USA. Since 2014 he has been commissioning books across several scientific disciplines for World Scientific Publishing. Merlin gives regular masterclasses to MA publishing students at UCL and Anglia Ruskin University and he has previously tutored on the ALPSP “Taking eBooks to Market” course.
Acquiring and Selling Publishing Assets
14 July, 9am-6pm, West One, London

Overview
This workshop will examine the issues, decisions and legal processes involved in the acquisition and sale of publishing assets and demonstrate how to achieve these as successfully and smoothly as possible. It will focus on asset sales and purchases but will also touch upon the considerations involved in buying or selling a company.

Programme
- Understanding the strategic drivers behind publishing acquisitions and disposals
- When is the right time to buy or sell?
- Disruptive changes in today’s market landscape
- How publishing assets are valued: methods and multiples
- The sale process: protocols, pitfalls, psychology
- The Information Memorandum: how to write it; how to read it
- The completion process: overview
- Due diligence: the detail
- The Sale and Purchase Agreement: detail.

By the end of the course delegates will be able to
Develop soundly-based acquisition and disposal strategies; understand how publishing assets are valued; know how a professionally-run sales process is organized; appreciate the legal considerations involved in completing transactions.

Who should attend
This workshop is designed for senior editorial/publishing managers or directors and also managing directors involved in the process of buying or selling assets or considering how to do so in future.

Tutors
Natalina Bertoli
Bertoli Mitchell
Natalina is Managing Partner of Bertoli Mitchell, an M&A and strategy advisory firm for publishing and digital information clients. Bertoli Mitchell advises on mergers, acquisitions, divestments, alliances and strategy both for privately and publicly owned companies, and for learned and professional bodies and other not-for-profit organizations. Natalina has over 20 years’ mergers and acquisitions experience and she has worked on the successful completion of over 100 transactions.

Richard Lane
Farrer & Co LLP
Richard leads the Corporate Team at lawyers, Farrer & Co LLP, and is a member of its Media Group. He advises on a broad range of corporate transactions including acquisitions, disposals, mergers and joint ventures. He acts for a number of publishing clients across the STM sector (including Societies) as well as consumer facing businesses. Richard previously worked for Thomson Reuters and holds an MBA from London Business School.

Philip Shaw
Bertoli Mitchell
Philip has been an Associate at Bertoli Mitchell since 2012. He has worked on a range of transactions and other assignments, offering strategic advice and handling the sales and marketing process for clients encompassing learned societies, commercial publishers and recent start-ups. Philip is also an Associate Lecturer at the Oxford International Centre for Publishing Studies. Formerly he was Managing Director at Elsevier and at Hachette.

Level 3

This course will end with a drinks reception

“
A very good course and a good idea as there aren’t many courses available on this topic, specific to publishing. Very good idea to get input from brokers.

R. Dewey,
Emerald Group Publishing

“This has been the most informative, enjoyable ALPSP course - out of a lot of great conferences.

Charlotte Brabants,
Oxford University Press

Book online at www.alpsp-training.org or email melissa.marshall@alpsp.org
Overview

Compliance with the law in relation to data can feel like a minefield. With the introduction of monetary penalties for breaches of legislation, and a new, tougher European data protection law on the horizon, it is essential that all publishers have a fundamental understanding of data compliance issues. In addition, awareness of guidance from the Information Commissioner’s Office is required and the reputational and financial risks resulting from breaches of legislation should not be ignored. The effective use of personal data for the purpose of communicating with customers lies at the heart of successful marketing strategies employed by publishers in the digital and global economy.

Data Protection: Compliance issues for publishers provides a primer to the key issues. This one day course is divided into two parts so that delegates can attend one or both of the sections as relevant to their role.

Part One: An Introduction to Data Protection Compliance Issues (half day session)

Programme

- What is personal data and what can we do with it? Introduction to the legislation, terminology and key legal requirements
- What if we get it wrong? The role of the Information Commissioner’s Office and the Courts; sanctions and enforcement
- Information governance: information and consent, data accuracy, data retention, data security and data export
- Cloud considerations: data protection issues arising from the cloud, and reducing the risks
- Subject Access Requests: understanding subject access rights and responding effectively
- Privacy by design.

By the end of the course delegates will be able to
Understand key data protection compliance issues and the risks of non-compliance. Apply these principles in their own organization and role.

Who should attend

Anyone who deals with personal data, for example those involved in HR, customer services, and those managing communications with customers, users, authors and members of societies. Each session is suitable for those new to the subject but it will also act as an excellent refresher for those who need an update on current legislation.
Part Two: Data Protection in Marketing and Research (half day session)

By the end of the course delegates will be able to
Understand key data protection compliance issues and the risks of non-compliance. Apply these principles in their own organization and role.

Who should attend
Anyone who deals with personal data particularly those in a marketing role. Each session is suitable for those new to the subject but it will also act as an excellent refresher for anyone who needs an update on current legislation.

Book the full day, or the standalone morning or afternoon session

Tutors

Helen Gainford
RELX Group
Helen is Director, Privacy & Data Protection for RELX Group, a world-leading provider of information solutions for professional customers. Helen advises and trains internal clients on privacy and data protection issues and manages the global data protection program for Elsevier, part of RELX Group. Helen holds the ISEB certification in Data Protection from BCS, The Chartered Institute for IT, and the CIPP/E, CIPP/US and CIPM credentials from the International Association of Privacy Professionals (IAPP).

Henry Sainty
Farrer & Co LLP
Henry is a solicitor and partner in the IP & Commercial team at London law firm Farrer & Co LLP, where he heads the firm’s Media Group. Henry has worked in data protection and information law since the mid-1990s, tracking the implementation of the 1998 Data Protection Act and advising the firm’s clients, particularly in the ‘data-heavy’ media and publishing sectors, ever since then.

Link to ICO very helpful as was the pre-course reading. It was an excellent day.
Fiona Green,
Bloomsbury Publishing
Overview
This course provides an essential introduction to copyright law and how it is used in practice. Delegates will gain an understanding of the legal publishing landscape, and be able to make sense of their own organization’s contracts and licences.

Programme
- What exactly is copyright: who owns it and who can enforce it?
- Moral rights: what they are and how they affect publishers
- International copyright framework: how it all fits
- Managing permissions: what to ask and what to record
- When you don’t need permission: ‘Fair dealing’ and ‘Fair use’ provisions
- Making permissions easier: blanket licences, bilateral agreements and outsourcing
- Introduction to Creative Commons and other online licences.

By the end of the course delegates will be able to
Understand the principles of copyright and how it works in an international digital and print environment; ensure that the moral rights of creators are upheld; understand permission systems and best use of Reproduction Rights Organizations (RROs) and outsourcing; understand the basics of online licensing in an open access or subscription-based environment.

Who should attend
People starting out in a rights or licensing role or with one to two years’ publishing experience in editorial and production functions in large and small organizations.

Tutors
Pippa Smart
PSP Consulting
Pippa Smart is a research, communication and publishing consultant, working for her own company, PSP Consulting. She has been in scholarly publishing for over 20 years, working for CAB International, Blackwell (Wiley) and Cambridge University Press. She then became Head of Publishing at INASP, directing initiatives to support research publishers within Africa, SE Asia and Latin America. She specializes in editorial strategies and copyright, and has developed many training courses as well as providing advisory services for journal publishers around the world. She is the editor/author of the monthly ALPSP Alert newsletter, and also the Editor-in-Chief of Learned Publishing.

Tim Ryan
Memery Crystal
Tim is a commercial lawyer whose practice includes publishing (digital and print), digital media and technology. He advises various national and international media organizations, technology companies and other businesses ranging from start-ups to listed companies. He advises on a range of matters from intellectual property, including copyright, to data protection and e-privacy. As well as working in private practice, Tim has headed-up the legal team within a large multi-national company and held various board positions.
**Legal**

**Level 2**

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**Licensing your Content**

**6 July, 9am-5pm, 41 Portland Place, London**

**Overview**

Licensing content has rapidly become a key component of the academic publishing environment, but why is this needed and what are the practicalities? What are the key issues to be aware of and consider when negotiating a licence? This course will outline the development of licensing on various platforms including print and online (to include all mobile devices). It will cover current issues around open access and the use of Creative Commons licences, and demonstrate how it relates in reality to the growing range of licence arrangements that are now available for all content.

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**Programme**

- Copyright refresher
- Overview of licensing structures and acquiring and exploiting rights
- Ways to enter into licences
- Types of licences and agreements whether direct with customers or through a third party
- Key issues with aggregators/third party vendors
- Entering into appropriate licences directly with the customer
- ‘Must-have’ clauses for the publisher and why you need them
- Clauses the customer wants to see and issues arising
- Current issues and trends including new technologies, ebooks and open access
- Current legal developments and protecting and enforcing your rights in the online environment.

**Who should attend**

Delegates should have a grasp of the copyright and legal framework (such as provided by the ALPSP Understanding Copyright course). Licensing your Content is aimed primarily at delegates working with licensing products to customers directly or via a third party. It will therefore be suitable across contracts, rights and licensing, sales, marketing and library liaison functions.

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**Tutors**

- **Simon Stokes**
  Blake Morgan
  Simon Stokes is a solicitor and partner with leading London and regional law firm Blake Morgan and heads their publishing practice. He has advised on publishing law for over 20 years. Simon is also the author of the highly regarded text *Digital Copyright: Law & Practice* (fourth edition 2014). The legal directory Legal 500 2013 commends Simon for his ‘expert erudition and commercial good sense’.

- **Duncan Campbell**
  Wiley
  Duncan is Director, Journal Digital Licensing, with John Wiley & Sons’ Research division, where he is responsible for licensing and business development for Wiley’s academic journal and database content. He is also engaged in developing Wiley’s strategies and policies with regard to government affairs, open access and text and data mining, and represents Wiley on several industry boards and committees.

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**By the end of the course delegates will be able to**

Fully understand the types of agreements used to license content and why certain clauses are included for the publisher and customer. They will also gain an understanding of current legal issues affecting online content and the implications for publishers.

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**Most informative and practical course I have attended via ALPSP. Lots of information thoroughly and professionally delivered.**

Nicola Haden, 
Royal Society of Chemistry

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**Very useful course and fantastic supplementary information.**

J. Mortimer, 
Policy Press

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Open Course Fees

Levels 1, 2 and 2-3
ALPSP Members: £365 (+ VAT where applicable)
Non Members: £530 (+ VAT where applicable)

Level 3
ALPSP Members: £470 (+ VAT where applicable)
Non Members: £565 (+ VAT where applicable)

Data Compliance, half day sessions, see pages 26-27

How to Book

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Email: melissa.marshall@alpsp.org
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Full terms and conditions are available on our website.

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Email: amanda.whiting@alpsp.org
Telephone: +44 (0) 1865 247776
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