



2022 SCOSS ANNUAL REPORT FORM – VERSION FOR PUBLIC SHARING

NAME OF THE REVIEWED INFRASTRUCTURE: PKP

APPLICATION FORM: [PKP Application Form](#)

YEAR IN THE CYCLE:

1/3

2/3

3/3

1. Discuss the status of the most important activities and milestones planned as specified in the Application Form (see section 6 of the Application Form). If there are important omissions or milestones that have not been achieved, please explain in the Additional comments section below.

Activity/Milestone 1: Marketing and Outreach

Status:

As outlined in PKP's original application, our intent with the SCOSS funds is to improve our communications and marketing strategy and team, and subsequently to enhance our operational efficiencies. In this reporting period, thanks in significant part to the SCOSS funds we received, PKP has made some significant strides towards achieving our first goal of improving our marketing, communications, and outreach:

1. Continued funding towards a Communications Coordinator position, and development of a more streamlined communications framework.

PKP hired Alejandra Casas Niño de Rivera as our new Communications Coordinator in 2022. Alejandra has extensive experience in communications, marketing, and outreach, and has deep ties to the Latin American scholarly publishing community (a key constituency for PKP). Alejandra has very quickly developed new and enhanced communications strategies, procedures, and internal reporting to help PKP systematically improve its effectiveness in this critical area. Of particular note, Alejandra has helped PKP find its "voice", a development that has been noted by multiple members of our international community.

PKP launched its completely revamped website in late 2022, with feedback so far indicating that it is a significant improvement in clarifying the identity, goals, and objectives for PKP and is already helping with marketing and outreach efforts. Further work is being done to make the crucial role of our community contributors more clearly visible.

In 2022 PKP also hired Famira Racy as our new Social Media & Communications Assistant to help Alejandra achieve her ambitious goals for PKP communications and marketing. Famira has quickly developed her understanding of our goals and



immediately made a difference in the quality of our communications activities, particularly on social media.

2. Support for Business Development

In 2022, PKP hired Mark Huskisson as our first Publishing Development Specialist. His role is to identify opportunities for growth for PKP Publishing Services to help it expand and inject even more funds into our core mission of open source software development (all PKP|PS profits go directly into software development). As of today, Mark has conducted an extensive market analysis and delivered a draft report to the PKP Directors group for internal review and feedback. Once completed, this document will guide PKP forward in its business development strategy for the next several years. PKP Publishing Services has experienced continuously increased revenue generation with only minimal marketing efforts, and this new, more professional approach is anticipated to help that profitability expand even further.

3. Support for Membership Development

Also in 2022, PKP hired Urooj Nizami as our new Community Engagement and Outreach Librarian. Urooj is responsible for the development of PKP memberships, including ensuring long-time financial contributors continue to support PKP, working with SCOSS funders to become ongoing PKP members, and to develop a strategy for expanding our membership base.

Activity/Milestone 2: Enhancing Operational Efficiency

Status:

PKP has worked to improve operational efficiency on two significant fronts throughout 2022: firstly, by implementing an LTS (Long-Term Service) model for predictable OJS support, and secondly, by enhancing our internal capacity for effectively importing content from other platforms or sources into OJS. This will assist more potential users to move from other systems and take advantage of the benefits of using OJS and being hosted and served by PKP PS.

A major source of operational inefficiency is the wide range of versions of the software in use in the PKP community, from current to badly out of date. This anecdotal issue was studied quantitatively and analyzed as part of PKP's Beacon project, with a resulting annual public dataset called Details of publications using software by the Public Knowledge Project, first released in 2021.

Engaging a community running obsolete software means repeatedly rediscovering old bugs, maintaining a burdensome institutional memory of changes and rationales, releasing mission-critical plugin updates (e.g. PKP|PN) for outdated software, and assuming responsibility for production use of obsolete third-party dependencies. It introduces a heavy burden on PKP staff, reducing their ability to innovate. It places the community at risk of security problems, and contributes to a perception that PKP software is not modern.



PKP has established several causes for its community's challenges in staying current. Many users do not have sufficient technical resources to upgrade, or may have hit technical challenges in that process; PKP has not set clear expectations about what versions of the software are still supported; and initial major releases of PKP software have been too frequent and not stable enough, leading to a mismatch between software release and institutional schedules and an aversion to upgrading.

Beginning in 2022, PKP introduced a line of software releases called LTS (Long-Term Support). These have a defined support window of 3-5 years and an expectation of high reliability. This adds a new upgrade track for users who do not want to upgrade on a frequent basis, and a promise of predictability and dependability. At the same time, PKP is setting clear end-of-life dates for older releases, and communicating the expectation that users will need to upgrade ahead of these. And finally, PKP has invested considerable development effort into improving the upgrade toolset to facilitate easier upgrading in the future.

To facilitate migration from other publishing platforms or sources, PKP PS has expanded and improved ingest pipelines for importing published content into OJS. This includes support for common open formats, including CSV, NLM, and JATS. This improved toolset allows PKP PS to offer existing journals a cost-effective, automated migration service and the opportunity to sidestep time-consuming, labour-intensive migrations across platforms. The improvements and tools have been openly shared with the PKP community, allowing universities, library publishers, and individual journals to more easily migrate their content into OJS from other platforms.

Overall, these operational efficiencies will make a significant improvement for PKP Publishing Services, leading to greater customer satisfaction; for PKP overall for better resource use; and for the PKP open source community, for a more predictable schedule of releases and upgrades.

Activity/Milestone 3: Supporting New Clients

Status:

2022 saw the addition of 54 new clients to PKP PS, accounting for 145 new installations of OJS, OMP or OPS – again a consistent improvement to the previous years' tallies. Of particular note, PKP|PS onboarded 8 institutional clients including Universidad de los Andes, University of Waikato, and The University of Illinois at Chicago .