

Interview with Jeff Pooley (mediastudies.press). 20/10/22

**Scholar-Led publishers share some common values around scaling small, removing barriers to open, bibliodiversity and non-competition. Tell me about the impetus to start up your press- why did you decide to found it? What needs were you hoping to meet?**

The impetus to found mediastudies.press actually came directly from an organization that had been founded, if my memory serves in 2019, called ScholarLed. The immediate or proximate reason for founding it was my excitement about seeing this organization get established, which was represented at the time by five scholar-led presses. It was established on values like the ones you've just described, though the phrase bibliodiversity wasn't in wide circulation as of yet. But nevertheless, the Scaling Small philosophy, the principle of non-competition, all of that was articulated on the website and in the Twitter account of the organization. I had already been writing about and observing what you could call it the scholarly communication landscape with particular interest. I was also studying barriers to authorship around book processing and article processing charges, as well as the kind of commercial oligopoly that controls most of at least the scientific publishing landscape. So I was very much interested in those issues. I knew punctum press, which is one of the founding ScholarLed members. I knew of Open Book Publishers and meson press as well, and had been following them with interest as a kind of non-profit scholar-led alternative in the book area. So that was the direct motivation, frankly.

The other motive was that I had the idea that this this sort of publishing model would involve a kind of mutual aid that was written into the very mission and self-description of this ScholarLed group, and I reached out to Eileen Joy, among other people, who is the co-lead of punctum books. She gave me some encouragement. I reached out to a few others. So that was the moment when I thought about a book publishing operation that would be cast in the mould, broadly speaking, of the values that ScholarLed represented at the time. And my press has since joined as a member, once the organization was established as a formal non-profit, fairly recently. The other reason that's overlapping with the one I just gave was that I was writing about these topics in semi-public facing outlets and I have the view that in addition to providing a platform for work within the broad fields of media studies that I wanted to, in essence, walk the talk, to understand the back end of publishing. To not merely make written pleas for the adoption of non-profit infrastructures and value driven publishing, but in fact kind of enact it, and learn along the way as a mutually beneficial relationship between my writing and the prospective press. So that was that was another major motivation. And then finally, I did think that in particular the media studies fields were ripe for a certain kind of publishing operation, which would be more open to versioning and to multimedia publication than was typical in even the kind of non-profit, university press world. I was curious about this platform called Pubpub, run by the Knowledge Futures Group, a non-profit based in the US. And after kicking the tires, so to

speak, with a number of different platforms, I became excited about the prospect of this one serving those needs that are especially appropriate to media studies fields, which are after all you know fast changing. Our object of study is multimedia typically, and the prospect of publishing in scholarship being in the same manifold mediums that the that research objects are was attractive to me as well. So maybe there were three motivations.

## **Are you incorporated? As what? Why?**

We are incorporated as a non-profit in Pennsylvania. I decided to incorporate in Pennsylvania because that is where I live and it's much easier to establish a non-profit corporation in a particular state in the United States. So that's an idiosyncrasy of my geographic location. But the corporation types, to use the US language, are rather limited in Pennsylvania, and one of them is the non-profit corporation. It was unquestionable and an absolute necessity that this press be organized on a non-profit basis. That's a kind of broad concept that doesn't speak to the legal arrangement. The one bucket, let's say, of corporation type that fits this is in fact in Pennsylvania called the non-profit corporation. It comes with a series of rules that are then supplemented by a process that you might have heard of, of applying for the federal Internal Revenue Service (IRS) status as a 501c3 non-profit, which is a further layer of expectations and rules that allow you to accept donations as a tax-deductible charity. This is getting into the weeds, but essentially this Pennsylvania corporation type was the one that would fit a non-profit, and the dictates of geography more or less meant that I would then, and we did, follow up with the IRS and obtain this 501c3 status as well. The non-profit category is inclusive of all kinds of different types of non-profits, and they all have certain obligations in common, which is to have governance, have bylaws meet once a year, not accrue a profit, etcetera, so charities fall under that umbrella too if they're registered in Pennsylvania. The rules are slightly different, state by state.

**A lot of people I've talked to so far have said that they've had difficulty in demonstrating or convincing either the IRS or whoever the applicable body is, that a publisher could be a public good or a non-profit. Did you have any difficulties with that?**

None at all. It was fairly routine, a fairly nice application process. A human being probably did process it, but the Pennsylvania case meant that this category was accepted by them and they never questioned it in the IRS. I didn't have any trouble on the first round of applications. You had to have been established as a non-profit first, and we were. Then I filled out the application process for the IRS and that went smoothly as well. So no, no problem whatsoever. But I do understand that in California, for example, the categories are different. I can understand how it could have been a challenge for punctum, for example, or other presses.

## **Regarding the governance of your press your size: what resources, elements and/or actors are involved in and/or subject to it?**

The answer is that the press has some formal governance that is partially — taking the theoretical spirit of your question — partially dictated by if you consider the states' and the federal rules. Those are a technology in the governance, or a player at least. So on our website we have the link to our bylaws and some of that is legal boilerplate that's more or less required by the IRS, or by the state of Pennsylvania. Those bylaws dictate the formal structure of the governance, in Board of Directors US form, which is again probably different state by state. But in the Pennsylvania case, the requirement is to have a Board of Directors that has supervisory oversight over the corporation. In some sense it *is* the corporation, to use the phrase that is inclusive of the non-profit status. And so that structure of a Board of Directors was the one we adopted partly out of necessity. That's the top-level governance. We also in a more informal way established an Advisory Board. That includes people who are both knowledgeable about media studies as a field or bundle of fields on the one hand, and those who are invested in and knowledgeable about the Open Access publishing and scholar-led publishing in particular on the other. So that body is designated in the bylaws as having advisory status. It has no kind of formal governance power. And to my embarrassment it has been relatively neglected, which is something I would very much like to change. In addition to that, there is a kind of staff position, which I mean to refer to as the Director role, which I'm sitting in. There's also an Associate Director role, and then the Board itself has some roles, like the Finance officer. I'm probably using the wrong word. It might be Treasurer or something like that. That exhausts the formal governance.

However, one of the practical facts of running this press centrally through donations by me and others, and, prior to what might be a different world with the Open Book Collective, and with developing the capacity to publish in the first place and so on, is that the question of governance has been on the back burner a little bit. Speaking of the Open Book Collective, I'm personally highly excited by and motivated by the example of the governance blueprint Janneke and Eileen Joy and you have put together. I'm really intrigued by that. One of the things that I wanted when I set up the Board and established the corporation in the first place was merely to be able to take donations. It wasn't thought through with any careful thought of governance in a way that is democratic or reflects the entity's values or anything like that. In fact, a guy who works in my department who I could just talk to is one of the Directors. He's going to step down and we've two new directors coming on who are more international and come from different racial and gender backgrounds. But at the time, it was just three people, and it was one guy who was in my department because of the legal requirement to have three Board members. It was much more checking off a box than thinking in any serious way about governance.

**Talk about the evolution of your governance structure and process? Did you use or adapt any external principles, guidelines or toolkits? Did you consider any?**

It hasn't really changed. The bylaws would be the equivalent to the Constitution. But to be perfectly frank, the governance questions have been on the back burner for the most part. We have had our annual meetings and the Board maintains a Mattermost that allows us to communicate in between meetings of the Board. We need to have one in in the next month, for example, that I need to get together. But the fact of being a working academic while running this press at the same time has meant that getting the books out and some of the other more practical exigencies of the role have taken more of my time than kind of properly thinking about governance going forward. But it *is* a priority of mine, actually. It's again partly motivated by in this case, the OBC's structure. That's not to say it would be one that I want to mimic exactly, but I'm motivated by the attentiveness to the questions like a craft, the care taken. Maybe it's been nightmarish from the inside! I've got glimpses of this back story. I'm sure that even ScholarLed set up as an organization which was equally thought through, and has benefits and drawbacks that come from a model of consensus maybe. I'm not quite fully sure. I'm not yet on the board of ScholarLed. But in any event, there is the issue like Oscar Wilde famously said: the problem with socialism is that it takes too many evenings, or there are too many meetings. I forget the exact phrasing. But there is a risk of sliding into a kind of governance fetishism or something like that, where we are being so attentive to those questions that it crowds out other day-to-day operational issues. But that's me speaking, in in terms of feeling a little stretched thin, running this as it's getting launched up and established in a more sustainable way. It feels a little bit like a luxury to spend time on issues of governance, but one that I care about and want to improve.

We did look at external documents when we adopted the bylaws. We looked at examples from other entities that I can't recall. I probably could reconstruct which models we looked at from changes tracked and so on. But we did mix and match language in there, in the bylaws at least, that was drawn from existing non-profits. But aside from the fundamental principle of the of the mission and the fact that its structure is a non-profit, there was, I would say, little thought given to building in things like scaling small or cooperative relationships to other presses and stuff like that. It's not reflected in those bylaws. It's much more of a legal document.

**How does governance operate now, regarding mechanisms like election, role appointment and consensus-seeking? How are conflicts and complaints dealt with?**

I am the Director. The Associate Director and I meet once a week as a standing meeting and talk about pending books and other matters that come up. The Board met in the first year. We got established in 2019, and have met either once or twice a year, always at least once a year. There are provisions in the bylaws to change the membership of the Board. So far that has just meant adding a couple of people, though in the upcoming meeting there will be, as I mentioned, a resignation and the addition of two people who in theory have agreed to serve. It's going to be part of the agenda to approve them as members by vote of the Board. Other kinds of policy level issues are discussed and approved on a consensus basis, though of course there's a provision for voting by the Board. To give you one example, we were considering the question of whether we should accept Book Publishing Charges if an author has funds from her university or from her Funding Agency sitting on the table. Do we accept those funds to help subsidize the cost of a book's production? Initially being so allergic to the Author Processing Charge format and its author excluding character, not really having seen how the other presses that are more established have done things, we had a policy where we just wouldn't accept them all together. And we had a discussion based on a prior proposal of language to adopt, which would modify this policy and bring it more in line with what I took to be the punctum, Open Book Publishers (OBP) and other presses' practice, which is to accept such funds, even ask authors if they have them, but explicitly rule out making editorial decisions on the basis of the funds' availability. I mentioned that just because it was then a discussion we had at the Board. We do post the minutes and so on but we might be behind on that one meeting. We adopted it by consensus, and changed the policy by consensus.

**What if a consensus wasn't reached? Would you vote?**

I think we would actually, and that is I believe laid out in the process. It hasn't come up yet, but I think we would vote and it would be on the basis of one member one vote. Which itself I definitely stipulated.

**When you appoint people to the Advisory Board, do you just choose them?**

Yes, I just chose them, and this was in the setup process. I just wrote to people individually and asked them if they would agree to serve and, engaged in a conversation with them over e-mail or on the phone. And once that permission was granted, we added them. The Advisory Board is mentioned in the bylaws in paragraph form, but it's not specifying much, and that is another piece of the governance that is just quite hollow at the moment. My intention is to at least be sending updates and then having a meeting once a year at least where questions of scope and policy are raised, but that has never happened actually. I mean updates have been sent but no meeting of the Advisory Board has ever occurred.

## **What written policies do you have and make available?**

The page we have is this transparency page on the press website. There was this commitment from the beginning to be transparent even to the level of finances. It does need a little bit of updating, but there is a list there of policies. So to take an example, if I go to Open Access principles, this is something that the Board formally adopted. I put it together and it is itself adapted and credited to others. But when we did make that change, you'll notice that there's an 'Authors with Funding' policy. That's the one I was referring to that basically the Board discussed and then adopted. It's the same with the peer review and the preservation policies. Those were vetted through the Board, but I had in practice sort of pre-written them, and talked in one case with my Associate Director since he was online at the time. It was more like we discussed and it was a ratification rather than a kind of collective decision making.

## **What institutions or organisations do you have relationships with? How does this influence the governance of the press?**

That's an excellent question. I'm going to this membership and affiliations page and just reference a couple of things that you may know, but we are not formally affiliated with any university, not my home institution, for example, Muhlenberg College nor any other. However, the journal that we run, the *History of Media Studies* journal, is funded through a North American consortium called LYRASIS, and their program called OACIP: Open Access Community Investment Program. It's not unlike the Open Book Collective's model, in a way. There are funders who've agreed to fund the journal for five years on the basis that it doesn't charge APCs and it's non-profit, and that other kind of governance and structured answers are provided. That successfully closed fairly recently in July or something. It's not an affiliation per se with any of those institutions, but they are receiving an annual report. And they are sort of expectations. That probably the main one to whom we at least account for our activity in our spending. Then we have membership in various things, which is pretty typical. We're a Crossref member, we are a member of the directory of Open Access Books, and we're a member of this consortium called Radical Open Access. None of these, the ones I just mentioned, has any direct bearing on governance. Although there was a process to become member of OAPEN and DOAB that involved designating various things. That included our bylaws or at least answers related to governments. The same is true of OASPA, where it was a pretty intense application process. And ScholarLed itself has you know something similar. So nothing is from any of these memberships or affiliations is, strictly speaking, dictating governance.

**No, but they're things you would take account of in your decision making process?**

Yes.

**How do you feel now about the governance of your press in relation to your aim and missions? Is there anything you would like to improve and develop?**

Yes. I've alluded to this in passing, but I will just repeat that I do think there's a gap between the mission and the kind of ethos that is driving the press, which aligns with some of the values you mentioned in the beginning, Scaling Small, non-competition, bibliodiversity and so on. There's a gap between those values that are there on our About Page and are represented publicly, a gap between those and the governance, which is much more conventional, not thought out, not dictated by those values in any straightforward way. It's been a neglected aspect. So I'd say both the Advisory Board and the Board itself are underutilized. The Board itself initially had been, I guess still technically is, strikingly non-diverse in geographic and gender and racial terms, which kind of cuts against our values. The aspiration is to engage the Advisory Board more formally, more regularly, to think about governance through the Board. I'm interested in the notion of Stewards and some of the other pieces of the OBC model. We should think about how to ventilate what was set up for just purely practical reasons. It's on the horizon, but awaiting time.