

HOW TO PUBLISH YOUR ACADEMIC PAPER

WITHOUT PUBLISHERS, BOSSES, GODS, OR MASTERS

A GUIDEBOOK



BY JESSICA FARRELL



How to Publish Your Academic Paper without Publishers, Bosses, Gods, or Masters

A Guidebook

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LIBRARY FUTURES
NEW YORK, NY



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About Library Futures

Library Futures is the vanguard nonprofit organization uncovering and confronting the fundamental policy issues that threaten libraries in the digital age. We believe librarians, policymakers, and community leaders deserve a new approach to digital rights so they can protect, advocate for, and advance a fair digital future for libraries and the communities they serve. Library Futures meets this need with fresh research, visionary policy and advocacy initiatives, and engaging education programs.

Library Futures is a project of the Engelberg Center on Innovation Law & Policy at New York University School of Law.

Visit us [online](#).



About the Research Network

The Library Futures Research Network is a group of researchers and creatives from the Library Futures community who are interested in asking bold questions and exploring new ideas on topics relevant to the organization's [key issues](#). Our goal is to “think together” to brainstorm, problem solve, experiment, and support each other through project creation and implementation.

Library Futures provides an outlet and an audience for the research network's boldest questions and ideas. Project formats range from podcasts and zines to research papers and resource templates.

About this Project

2024 Library Futures Research Network Award

Jessica Farrell's "How to Publish Your Academic Paper without Publishers, Bosses, Gods, or Masters" based on her experience and expertise in community-led academic publishing. Her DIY approach leads academic authors through collaborative research, writing, and editing; community peer review, selecting a publishing platform, and promotion—all without relying on the typical masters of academic publishing. We are pleased to support work that expands how scholars can create, produce, and share their research.

Funding for this project was provided by the [Richard Lounsbery Foundation](#). Library Futures is proud to support the work of our community and to amplify the voices of those doing crucial work on equitable access in the digital age. We are grateful to the members of our [research network](#) for being a part of it.

About the Grantee

Jessica Farrell, sole proprietor of Redstart Works, is a facilitator, educator, archivist, and consultant who takes on projects that shift power and resources to archivists, archives, maintainers, and the commons. Before founding Redstart Works, she worked in public, private, and corporate archives as a digital archivist, and as a project manager and community facilitator for a library research nonprofit. She has helped sustain several born-digital archiving and preservation communities.

Authors, Acknowledgments, and Additional Information

Authors

This guidebook was developed by Jessica Farrell. The guidebook was enhanced by editing support from Laura Crossett, Sally DeBauche, Christina Velasquez Fidler, Kathleen Fitzpatrick, Nathan Gerth, Meaghan Kelly, and John Maxwell.

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In this guidebook, the author has documented knowledge that was developed by many more individuals participating in communities of practice together over ~2015 – 2025 in spaces hosted by the BitCurator Consortium, the Digital Library Federation and Digital Library Federation Born-Digital Working Group, the Digital Preservation Coalition, the Email Archiving and Preservation Interest Group, the National Digital Stewardship Alliance, the Software Preservation Network, and the Society of American Archivists.

Feedback, Sustainability, and Re-Use

The author commits to updating any factual errors about the projects and communities described in the guide that are reported. The author welcomes any feedback on the guidebook, including how readers use it. The author does not have a specific sustainability or re-use study plan for the guidebook. Technologies in use for writing, editing, and publishing evolve constantly, and this guidebook may be seen as a snapshot of advice in 2025.

PART I: INTRODUCTION TO COMMUNITY PUBLISHING

Introduction

This guide shares model workflows for academic community self-publishing: that is, collaborative research, writing, editing, community peer review, design and layout, and DIY (do-it-yourself) outreach and promotion processes.

Do you feel the urge to pursue research or develop shared practices that improve your work, but feel unsure how to get started? Or maybe you don't consider yourself a scholar in a discipline, but you are a curious person who would like to share what you've learned about something. Get a group together and publish it yourself! Bring your work in conversation with a community. Anyone can engage in knowledge production through community publishing practices.

My perspective

I am an archivist based in the United States. I have worked in corporate, public, and academic archives; nonprofits; and a small business. My guidance is based in practice and a modest literature review. The six community academic publications I have co-authored include guides for digital archives practice, research on user experiences, and examinations of archival practice involving incarcerated people. The publications did not require developing research software, graphics that visualize complex data, or a mechanism for sharing complex datasets. I did not write them to satisfy tenure or other promotional requirements. While I hope the guide has some relevance across academic disciplines, I acknowledge that the guide is likely to be most useful for librarians and other academics in the humanities and social sciences.

Paper

This guidebook is written from experience publishing texts. The sample workflows described generally have the equivalent of an academic journal article in mind as the primary output. However, there are many other forms to publish academic work in, from zines to software to video. The workflows described herein, particularly the [Facilitation and Project Management](#) guidance, can be applied to other outputs. I have used the word “paper” throughout to maintain consistency, but invite the reader to replace the word “paper” with whatever their planned output is.

You

I wrote much of this guidebook in the second person. When I say “you,” I mean the person in the [role](#) that is related to the activity that is being described, imagining that person as the reader of the section. Sometimes “you” also refers to the whole project team.

Community Publishing

At its heart, this guide is for people who would like to practice community, largely DIY, academic publishing. Some attributes of community academic publishing include:

- co-authorship
- greater control over the form and design of the publication
- communicating outside of academia to share work
- storing work in free and open online repositories; contributing to decentralized infrastructure for knowledge production
- unlearning traditional academic writing styles
- sharing knowledge outside of traditional publishing practices
- caring for contributors, the community, and the labor of writing and publishing
- meaningfully engaging with colleagues' expertise
- seeking collaboration, leaning on our colleagues to produce the best research we can in the circumstances and contexts we find ourselves in
- seeking a framework for researching across institutions and borders, with or without permission from an authoritative body, in the name of mutual aid, solidarity, and the continuation of research

See [Appendix 1](#) for some examples of community publishing projects and how they model different aspects of the publishing workflow.

Self-publishing is typically more labor than working with publishers, but for some people, it meets their goals and needs better. This guide talks about how to manage the shift in labor and resources to produce a high-quality, self-published, co-authored paper or other academic output.

There are plenty of open access (OA) publishers that provide access to academic articles at no cost to readers, so what are some of the incentives for taking on the work of a do-it-yourself publication? Whether you decide to self-publish or work with a publisher depends on your goals and your needs.

Sovereignty

Community publishing can afford full ownership of and control of the editing, publishing, and outreach process. You will choose how to proceed at every step of the workflow: what publishing and typesetting platforms to use, how to manage peer review, what your timeline will be, how you will perform outreach, and more. Sovereignty is empowering, but the trade-off is doing and coordinating the labor that an established publisher would normally perform.

The submission process is completely cut out of the picture in a self-publishing project. Authors don't have to evaluate potential publishers to find a good and reputable fit. Sometimes reaching [aligned communities](#) is even better served by self-publishing, where access is expanded and controlled by the author.

Authors do not have to wait for permission to publish. They can avoid all the big feelings that come along with submission processes. Sovereignty can lend more enthusiasm, agency, creative energy, and spiritual connection to your work. Doing something because you feel the innate desire to do it feels authentic.

Experimentation and Flexibility

Self-publishing removes restrictions on presentation of the work and its research data, and eliminates the submission process altogether. But it adds editing, layout, coordinating, and publicity labor to the authors' plate, labor that is performed by hardworking editors and designers when going a traditional publishing route.

You can experiment with new workflows, new output mediums, and new ways of reaching audiences when you self-publish. For example, there are few journals that administer open community peer review.

Willingness to take on essential non-writing labor

Established publishers take on the labor of outreach, copyediting, and typesetting. They require structures to organize and manage submissions. Authors must learn to deliver work within those structures, no matter how idiosyncratic they are. Publishers designate which platforms to use, and these platforms may or may not be the best options for your work. Publishers support marketing and outreach within the limits of their own communications policies and practices.

You may be able to pick and choose just "how" DIY you go, based on the interests and capacity of your author group. You may seek a small amount of funding for a consultant to complete one portion of the work such as data analysis, editing, or web design. You may seek partnerships with allied organizations that have infrastructure to share, such as hosting your work in an organization's repository and acknowledging them as co-publisher.

Developing connections

The learning outcomes are different when self-publishing than working with a publisher. When working with a publisher, you will improve your writing through a professional editor and usually a blind peer review process.¹ When writing openly in community with others, you will improve your writing and understanding of the subject by co-editing with your author group, which can bring deep insights into the work, and co-editing with a community of practice, which extends the reach and further improves the work. You will learn things along the way from your co-authors and community editors.

The longer you work in community with each other, the more likely you are to build your own small community of practice. Communities of practices develop knowledge and nurture their members through solidarity and resilience. You will likely think of each other when similar questions come up later in your career. You may find yourself working with some of these colleagues again. You now have a group of people you can turn to for asking advice on whatever topic you just developed together. People spend years trying to crack the code of professional networking cliques to find their people, and you're doing it for free, without the risk of catching COVID, while producing something valuable and enhancing your professional network. These are all happy side effects of community self-publishing.

Cost

Cost can be a factor in deciding to self-publish. Sometimes there are fees to publish in open access journals, although there are several interventions designed to mitigate cost to authors especially if they are affiliated with a large university.²

Collaborative self-publishing can cost \$0 if the authors are particularly comfortable with open source software and developing their own tools. But for most groups, access to word processing and desktop publishing software is required. For readers who work at an organization, you may have access to software that you can use in your project. The [Platforms](#) section lists several options for paid and “free” (like a puppy!) software. The [Projects with a Budget](#) section discusses funding projects.

1. For an overview of different review processes, including examples of journals in the field of psychology that employ each style of review, see Shoham and Pitman, “[Open versus Blind Peer Review: Is Anonymity Better than Transparency?](#)”
2. Journals and university presses have transformative agreements with institutions where the cost to publish open access is covered by the author's institution rather than the author. Some larger university presses have agreements with low- or middle-income countries to fully cover the cost of OA publishing.

Imperfection and Iteration

Qualities of the published product such as formatting, typo-free text, marketing effort, or repository metadata completeness can vary because it depends on the capacities, strengths, and weaknesses of the collective. The abilities of the collective may be different from your own individual strengths and weaknesses, so accepting imperfection is important for successful collaborative work.

The guide explains in detail how to go about self-publishing your work, but you will likely need to determine what minimum viable labor looks like for your project's goals. You may not need to comprehensively take all the steps outlined in the guide. It is okay to intentionally not put much in and not get much out for a quick prototype or idea or light research you wanted to throw out there to see if it resonates but don't want to put a lot of up-front time in working on.

There is technically no drop-dead date after which the work cannot be changed, which makes publishing with imperfections more comfortable. Since you often have control over the infrastructure in self-publishing, fixing mistakes or updating post-publication is possible. Some projects, like the Digital Library Federation Born-Digital Access Working Group's [Levels of Born Digital Access](#), develop a sustainability plan to invite updates or new iterations of the work in the future. Jonny Saunders's "[Decentralized Infrastructure for \(Neuro\)Science](#)" includes a commenting mechanism with updates made over time at the author's discretion.

Publishing too hastily and taking on a lot of editing debt is not an efficient workflow, so there is a balance between accepting imperfection and planning to iterate. But in a world where we are driven to unhelpful levels of perfection, remember that getting your work out there is enough: your knowledge is useful for others to learn from despite typos or a couple errant tracked-and-accepted-changes gone wrong.

Engagement

In my experience, having people with different perspectives, at different points in their career, review a work gives it a well-rounded review. Releasing the work early and asking people to engage also draws attention to it, building your community of learners / users before your product is released. Some community members may anticipate and make time for reviewing the document after getting a sneak peak in the [Community Review](#) phase.

Outreach is a well-understood task in my discipline (information science), where our primary goal is to connect people to information. We must spread the word about the services we offer early and often. Many librarians, archivists, and other academics practice everyday outreach via social media in their personal and often professional lives, too. While some publishers have excellent marketing reach to their general audiences, you may not have control over where or how your work is marketed. This is one benefit of producing and sharing a DIY publication. Only you can reach your network using the framing that you prefer, and your network is the people who are interested in your work.

Reducing Silos for Infrastructure and Survival

[“Decentralized Infrastructure for \(Neuro\)Science”](#) reckons with the lack of infrastructure in science to openly share knowledge. It acknowledges the human and financial resources drained due to lack of infrastructure. It lays out what decentralized shared infrastructure that we build, own, and control could look like. I point readers toward this guide for a strong theoretical underpinning for why open knowledge is important, and how monied “open” providers cannot meet our knowledge infrastructure needs.

The silos I see in my discipline of library science look the same when I read about silos in neuroscience. Academic institutions enjoy different resourcing levels overall, and different resourcing levels for “open access,” greatly affecting support for open knowledge infrastructure.

Silos may look like they use less resources in the short-term. It takes more labor and time to operate under broad consensus and collaboration. Working alone or with fully known quantities often facilitates quicker results. But in the long-term, silos are inefficient because they do not produce the best solutions. Producing [ethical](#) research across institutions and borders is challenging. We live in a world where the short-term is privileged over the long-term, and taking the time to collaborate and thoughtfully consider and respond to different ideas is a radical act, a deep commitment to our craft.

Saunders identifies realities in the neuroscience community that ring true across academia, including in librarianship. “Open” is still a bit performative, without the resourcing and strategic muscle to preserve and provide access to work in new media forms. Platforms enclose our work and restrain our creativity. Publishers often ignore or minimize the need to preserve and provide access to underlying research data. For very large publishers, their main business is in user data capture and sale, not necessarily knowledge production.

We must generate accessible and open knowledge in order to cross-pollinate our work across disciplines, for survival. Sharing practices and understanding across disciplines is necessary for us to achieve our research and community goals in today’s complex and interconnected world. Research as an enterprise does not fit within dominant capitalist frameworks and thus researchers will always fight for the survival of their craft. To thrive, academics must engage in solidarity-building activities with their colleagues and across institutional and state borders, maintaining strong research networks that will survive across generations. Community self-publishing is a space where these activities can flourish.

The explosion in access to information and communication technologies over the past few decades has increased our ability to communicate, understand each other, and work together. Good practices are being designed and redesigned in rapid succession as we work to keep up with new technologies, the pressures of market forces, and our academic disciplines’ stated values and ethics.

The increased ability to communicate and understand each other also inspires many academic workers to re-design or amend good practices in ways that make our work less harmful, oppressive, or colonial.

While we think of academics as usually going through a tenure process, often beholden to traditional publishing practices, reality is different: most academics are not tenured or working toward tenure. According to the American Association of University Professors (AAUP), the US academic workforce has shifted from full-time tenured or tenure-track faculty to mostly contingent faculty in the past few decades. About 24% of US faculty members enjoy full-time tenured appointments in 2021 compared to 39% in 1987.¹ Since the AAUP began tracking this data, tenured appointments were never the majority, but the percentage of tenured professors is continually decreasing. There are many reasons that finicky, traditional, prestige-oriented, anonymous-reviewed publications are valuable to different scholars, but a majority of the US academic workforce can choose not to engage with the publishing system if they wish.

1. AAUP, "[Data Snapshot: Tenure and Contingency in US Higher Education.](#)"

PART II: PLANNING AND SUSTAINING THE PROJECT

A Community Publishing Workflow

A typical publishing project includes the following steps:



1. [Research](#)
2. [Write](#)
3. [Edit](#)
4. [Community Review](#)
5. [Additional Components](#)
6. [Copyedit](#)
7. [Design](#)
8. [Proofread](#)
9. [Deposit](#)
10. [Share](#)

The best laid plans of mice and men will go awry, but it's still valuable to develop a set of goals, a draft timeline, and expectations for the group before diving into research and writing. Ideating and planning together gives people a realistic idea of the scope of work, so they have an honest opportunity to consent to requested time and efforts. Your plan will change as your project evolves, but it's helpful to consider the whole workflow before getting started.

This part of the guide covers the early planning and setup to consider for your best laid plans. Section III covers all other steps to executing a community writing project with guidance on how to approach each one.

Find Your People

The best collaborative writing projects emerge naturally from curious people who have similar questions coming together to answer them. If you have an idea that's not yet socialized, you can start by talking to other people to gauge who wants to be involved. Some ways to reach people include:

- Bring the idea up to an appropriate community of practice or professional group to see if others are interested. Send a message to the group's listserv, Discord, Slack, or other community space; or find contact information from the coordinator(s) and ask about the best community venue for socializing your idea.
- Talk about the idea to your peers and see if they have the same questions.
- Schedule virtual or in-person coffee meetings with people you think might have similar research interests.
- Write a blog about your research questions and share it around to get engagement.
- Post about it on social media and see if it resonates with others there.
- Present about the idea at a conference.
- Use an exploratory conference panel as inspiration to develop a collaborative writing project.

Working in Community

Where are the other people who care about your research interests and goals? Try to identify an existing community of practice that you can contribute to and engage with. You will find collaborators, co-authors, reviewers, and users in your community of practice, making audience identification a straightforward task. Communities of practice can also be great hosts of projects and publishing infrastructure.

Most of my experience comes from working with collaborative writing groups within communities of practice. Sometimes that means an organization built around a particular discipline or interest, and sometimes it means an ad-hoc group that has emerged through grant projects or other multi-institution projects. For example:

- The [Digital Library Federation](#) (DLF) hosts many working groups and supports publishing the research outputs of their working groups. The groups are entirely self-directed. I co-founded the Born-Digital Access Working Group at DLF with the intention to work with a fiscal host that was accustomed to supporting decentralized work.
- DLF's fiscal host the [Council on Library and Information Resources](#) (CLIR) also provides some publishing opportunities, particularly through the [Pocket Burgundy](#) publishing series.
- The [BitCurator Consortium](#) and the [Software Preservation Network](#) are digital archiving communities of practice that invite people to form research and publishing groups (among many other activities!).

- The publication [Good Practices for Acquiring Email](#) was developed by the The Email Archiving and Preservation Interest Group, whose startup was funded by a Mellon Foundation and University of Illinois regrant program for building capacity and community for web archiving.
- The [National Digital Stewardship Alliance](#), hosted by DLF, administers essential field-wide research on digital archives practice and infrastructure trends. They also develop best practices. Anyone can join and start a digital archives research project.

My list is a specific slice of a niche library discipline, digital archives, and I could still go on with many more examples of great communities to engage with. Research the organizations, communities, and ad-hoc groups related to your topic by reviewing professional association websites, asking colleagues if they know of anyone, and perusing your professional social media networks. If you aren't already a member of a community you think might be a good fit, then figure out how to get involved and express your interest. Communities have varying membership models, but many (including ones I list) have opportunities for individuals to participate at no cost.¹

If you don't have a community in mind, maybe you're building a new community! It will be less straightforward how to identify your core audience without a host community, but that's okay.

Right-sized Recruitment

The more people you bring together, the more time and effort coordinating all their wonderful contributions will take. 4-6 people is a good size for a group with one coordinator. If you have more coordination and project management support available within or outside the group, you may be able to manage a larger author team. Larger groups require intentional working structures that accommodate subgroups or subcommittees.

Review the section on [roles](#) to consider your recruitment needs. There are certainly enough roles to fill for many people to join in, if there is capacity to support them! Recruiting for specific roles on the team can be an effective way of filling the roles. Prospective collaborators respond more readily to specific needs than broad calls to "join the group." They also need to understand the [research topic and goals](#), or the plan for developing them.

Use empathetic communication with potential collaborators. Establish and then honor the project's boundaries: Create a plan for how you will say "no" if interest in being in the writing group exceeds the capacity of the coordinator(s). For example, thank them for their interest and invite them to participate in a data gathering or review process when the project reaches those stages. Remind them that you are committed to honoring their contributions if they participate in this way.

1. However, all endeavors require resources, and many communities rely on institutional memberships to sustain their operations. If you are involved in a community as an individual free of cost and you are employed by an institution, consider advocating for your institution to purchase a community membership.

Onboard the group by establishing group expectations, research questions, and goals together. If you take on new members during the course of the project, set aside time to onboard them.

Get Started

The coordinator should bring the group together for an introductory call.

In the meeting, determine meeting frequency and schedule, and how the group will communicate. Make sure you have a notetaker who is not the facilitator to ensure detailed notes. If you have time after determining frequency and scheduling logistics, begin to discuss project goals and research questions. After the introductory call, set up recurring meetings for the group.

For the first few scheduled calls, before beginning the project in earnest, plan the project together. [Get to know each other](#), define research goals, set [expectations](#), take on [roles](#), select [platforms](#), and set up project [infrastructure](#). The sample agenda in [Appendix 2](#) is a tool for determining project goals and research questions.

Group Expectations

Community Agreements

Setting a good vibe doesn't just fall to the leader. Establish ground rules together. Consider adopting a code of conduct or community agreement that aligns with your profession, community, and group's values and goals. Codes of conduct are typically used in spaces that have a physical component, such as an organization with a conference, or an established committee or group. Community agreements are well suited for short-term engagements, like projects and workshops.

Implementing a community agreement or code of conduct involves two stages: developing it, then using it.

Developing Agreements

Develop the text and agree on it. Include a guideline for what you will do if harm occurs.

Professional association and community codes of conduct are a great place to get inspiration for a community agreement. Here are some examples:

- [BitCurator Consortium Code of Conduct](#)
- [Software Preservation Network Code of Conduct](#)
- [Digital Library Federation Code of Conduct](#)
- [Data Curation Network Code of Conduct](#)

All of these examples include processes for what happens if harm occurs.

Communicating and Using Agreements

Share the agreement once it's established, then periodically remind the group that the ground rules exist. Examples of ways to communicate community agreements:

- Link to the agreement in your group's central infrastructure, whatever space is most commonly accessed by the group (for example: running notes, chat application channel description, project management system landing page, etc.)
- Remind people verbally at the beginning of the first few meetings and whenever there are new members in the room
- For large meetings, share the agreement and how to act if harm occurs in the chat or opening comments around 5 minutes into the meeting

If harm occurs, follow the process for acting.

Right-sized Agreements

Is your project a short-term or a long-term one? How many members are you managing? Match your conduct enforcement methods and levels to the size, capacity, and needs of the group. It's perfectly fine to have a lightweight, maybe even undocumented community agreement, if that works for the group. The important thing is that the group spends some time discussing community agreements and implements what is needed.

The [BitCurator Consortium](#) (BCC) developed a project to co-learn python together in self-perpetuating, non-hierarchical groups. When the Python Study Groups coordinators came together to organize and administer a pilot, they established community guidelines for themselves as an exercise in expressing the goals of the project.

When the BCC launched their ten study groups, coordinators shared a template community agreement with each group. Coordinators suggested that each group make changes together, then adopt their agreement. All groups agreed to adopt a community agreement, and most groups took on the template version with few revisions. This lightweight document was adequate for the small groups' needs.

Roles and Responsibilities for Community Publishing

After your group has approved their shared goals, research questions, and audience, turn to implementation. Discuss the roles, platforms, and work products associated with each [implementation step](#). Discuss the tasks associated with each role. Discuss the timelines associated with each role. Ask team members to take on roles, and document these commitments. Not all of these roles will be active at the same time, so some people may fulfill different roles in different parts of the process.

Depending on the nature of your project and its outputs, you will need people to fill roles such as:

Meeting coordinators / project managers (2)

Coordinators lead administrative activities and often maintain working infrastructure. They convene meetings, communicate between meetings, and liaise to any vendors or groups the team is working with. They often provide tech support, adding people to platforms, reminding everyone to use platforms, and providing a wayfinding service for people who are lost about where to go to find what they need. As the agenda holders, they often keep up with action items and timelines, reminding the group of self-imposed deadlines and recapping decisions.

It is helpful to have two co-coordinators who can share the burden of coordinating the project and its participants, or to rotate coordinators every few months. Coordinators who also serve as writers or editors will have less capacity for their secondary roles. Rotating coordinators requires smooth communication and handoffs and is more work than having one person in the role indefinitely, but it provides greater participation opportunities for team members to engage in different activities throughout the project.

The [Facilitation and Project Management](#) section expands on coordination and project management.

Research designers (2+)

Research designers should focus on three key areas of work: instrument design, data analysis, and research outreach. Research designers co-create instruments with the group and lead their completion. They lead decisions on data analysis tools and methodologies to adopt. They analyze data solo or coordinate co-analysis of the data with the group, depending on their chosen analysis methods.

They also serve as research outreach coordinators. They develop research outreach messaging that the project outreach coordinator can polish and send. They participate in sharing the research instruments with identified audience members.

The [Research](#) section expands on designing and executing research.

Writers (2+)

Writers review relevant literature, analyze (or work with research designers to analyze) collected data, and write the content. Many writers does not necessarily make lighter work, but many writers will enrich your publication with different perspectives.

During the editing process, the Editor(s), project team, and community reviewers suggest edits and make comments. The writers make edits that they consent to, and perform further research as inspired to resolve questions.

The writers can work with the team editor(s) to respond to comments after community review. This additional layer of communication is not required, but sometimes it is helpful to chat through how to communicate, especially if the decision was to not take the suggested revision.

The [Write](#) and [Edit](#) sections expand on these activities.

Editors (1+)

Editors co-create the shape and voice of the paper with writers. They help at a few points in the community publishing workflow. The first task that editors can do is bring sections authored by different contributors together into one coherent work for an [Internal Review](#).

During internal review, they look for opportunities to expand explanations and add sources. They propose ideas about moving around sections, changing voice, removing or adding sections, and other editing in the name of deeper clarity.

During community review, the team editor(s) can work with the writers to respond to comments. Editors ensure that the comments are addressed. They wrangle writers to make edits, pointing them toward comments they think are important to address. They help determine what research is needed to address deeper questions uncovered by the review process. They may address some comments themselves, too.

Another important role editors can take on is documenting the community reviewers who comment or suggest changes in-line. This is best done before accepting suggested in-line changes and closing out addressed comments. Keep a list of everyone who has contributed to the document for the [Acknowledgements](#).

The [Edit](#) section expands on these activities.

Community review lead (1+)

The community review lead creates the community review document, manages [version control](#) between different rounds of review, develops outreach messaging, and manages permissions on the document. If the group does not put together a timeline for community review during their planning phase, the community review lead can establish and share a plan and timeline for community review.

Setting up the community review document is more than a quick copy and paste: it involves describing context and potentially pre-filling some comments or questions in the document for reviewers to consider.

While it helps to have one person in charge of version control and permissions, the other communications tasks can be split up among additional team members.

The [Community Review](#) section expands on these activities.

Copyeditors (1+)

After the editor has gotten the writers to finish writing, the copyeditor arrives to simplify and polish the writing. They address complicated language and syntax constructions, and they review the work for grammar, typos, and other minute changes.

Copyediting occurs once, after community review edits are complete and before proofreading.

The [Copyedit](#) section expands on these activities.

Proofreaders (1+)

Proofreaders ensure that formatting, numbering, and headings are displayed correctly, and they also serve as a second pair of eyes for grammar and typo mistakes.

Proofreaders can be the same people as the editors or copyeditors, but it's helpful to have someone who has not already been as enmeshed in the details of the publication do at least one of the proofreads.

Proofreading occurs at least twice: Once after community review, as a final step before moving on to layout and design. Then again after layout and design, where new errors are often introduced.

The [Proofread](#) section expands on these activities.

Publication Designer (1)

The publication designer moves the publication from a finished text to a publishable draft, usually by designing and implementing consistent formatting, typesetting, and layout styles. They should have either 1) access to design software they can use to stage the publication, or 2) interest and capacity to develop a layout in a markdown editor, [Libre Office](#) Writer, [Google Docs](#), [Microsoft Word](#), or similar word processing software.

The [Design](#) section expands on these activities.

Graphic Designer (1+)

Graphic designers create data visualizations and prepare them to the publication designer's specifications. They may curate images for a cover page or other graphic illustrations throughout the work. They may create or work with the publication designer to create the cover page.

The [Cover Page](#) section expands on graphic design activities.

Accessibility Reviewer (1)

Accessibility reviewers identify and address accessibility issues in research instruments, internal platforms (if needed), and design platforms. They identify and address accessibility issues after layout and design is complete, but before the final proofread has occurred.

The [Accessibility Review](#) section expands on these activities.

Repository manager (1)

You will need a repository to deposit your community-led publication. That repository needs to provide you with a digital object identifier (DOI). If the repository is not pre-determined by an institutional host for the project, the repository manager leads the selection of the repository in conversation with the team.

They develop and manage project metadata in the repository, and they ingest the complete publication into the selected repository. The platform administrator should ensure that all authors and co-editors are acknowledged on the publication record or publication page; sometimes this involves requesting that people create accounts or approve being tagged.

Some groups may have institutional support for repository management and do not need to source selection and management labor from the team. Even in these situations, someone on the team should serve as the repository liaison. The repository liaison can work with institutional staff to ensure metadata completeness and any other functionality or settings that are required to accessibly serve the publication to users.

The [Deposit](#) section expands on these activities.

Outreach coordinator (1+)

Outreach coordinators send messages developed by research designers and community review leads during the writing and editing process. They plan and execute a multi-channel publication launch as the project nears completion. They own the outreach list, and they coordinate outreach among the team, ensuring that everyone gets an opportunity to communicate about the project (including themselves!).

It's usually best for the person closest to the work to create a first draft of communications, so research designers and community review leads should write the first draft of their public communications. The outreach coordinator may coach or ask questions to facilitate past a writer's block. The outreach coordinator can then polish the message.

It is possible to skip assigning a single outreach coordinator, and distribute the role among the team, putting the outreach labor on creators. I like to have a separate role if possible. Outreach coordinators can speed up getting communications out the door. The writing process gets very tiring by the end for writers, with so much analysis, thoughtful editing, and conversation about the topic. Passing the baton to an outreach coordinator after creation can be a well-earned break for writers, research designers, and other creators in your project, and provide for a successful launch.

The [Share](#) section expands on outreach tactics.

Platforms

Throughout the writing project, you will use various technology platforms to write, edit, review, and disseminate the work. The group should first determine a shared writing and editing platform.

Depending on how much institutional support you have for the project, you may need to select platforms to design the publication's layout and deliver the publication to readers. Consider your options during the planning process. Information in digital repositories may need to be updated over time, so consider how you would make a change in the future as you think about deposit.

Choosing Platforms

You may have one platform to rule them all or a chain of software that serves different functions as you write, edit, design, and publish your work. I have elaborated on the platform needs during different parts of the workflow, and provided a chart of platforms that meet those needs with various considerations for adopting them.

Writing and Editing Platforms

The best writing and editing platform is the one that the majority of your group already knows how to use. Note that even when people are excited about learning new technology, learning new technology is a separate activity from writing, and it will take separate time and capacity.

The user interfaces and functionality of many longstanding text editors can be overwhelming and many text editors include unnecessary features for the purposes of your project. Consider these primary features when choosing a platform that will meet as many publishing workflow needs in one package as possible.

- There is a commenting feature
- There is a way for people to comment or suggest edits without having to render and share a new file
- There is a way to turn access to the document on or off
- Built-in [version control](#) is essential.

I have used [Google Docs](#) most often for writing, editing, and community review because it was the lowest-friction choice for all of the writing teams I've participated in, but there are many other collaborative writing and editing tools. As of late 2025, almost all of the platforms in [Appendix 4](#) offer options that are no cost to the user, although some no-cost solutions require technical confidence to implement, and others require giving up privacy. Microsoft 365 both requires a paid license and

requires giving up privacy, but is commonly available through all types of organizations, so I have included it.

Different disciplines vary in which applications are most popular for their writing and presentation needs, so ask around to find out what your peers are using. Networked platforms like Cryptpad, NextCloud, Google Docs, or Microsoft 365 will enable the group to easily comment on each other's drafts and control versions.

Non-networked platforms like LibreOffice or Microsoft Office are possible but not recommended for collaborative writing because of the additional labor required to comment on drafts and track versions when there are many collaborators.¹ If you choose to use non-networked platforms to draft and share documents, you should set timeline and work scope expectations that include additional capacity for bringing drafts together, tracking versions, and managing a central repository of documents. One could use the principles and practices of collaborative writing and community review described in this guide to administer in-person reviews with paper copies, or other more creative digital interpretations and format deliveries for writing and reviewing together. But in practice, the sample workflow envisions a digital networked document with community review features built into the chosen writing platform.

See [Appendix 4](#) for a comparison of some writing and editing platforms available in 2025.

Layout and Typesetting Platforms

There is a broad spectrum of activity you can undertake with layout and typesetting. You can go as simple as using a document's default formatting settings, adding a cover page with a visual, and exporting it to a PDF.

The author groups for [Legal and Ethical Considerations for Born-Digital Access](#) and [Good Practices for Acquiring Email](#) used similar layout and typesetting workflows. They collaboratively wrote, reviewed, and edited in Google Docs. Then they used Adobe InDesign to set text and layout, with one person fulfilling the role of layout manager. The layout manager sent the staged draft back and forth to the group for review, and implemented edits that the group identified.

For another example, when I worked at Educopia Institute, we used Google Docs to write, edit, review, and publish. We added a [cover page](#) and exported the document to PDF with Google Docs. We minted a DOI in Zenodo, and delivered the publication via our primary access repository, the Educopia Institute website (or if we were supporting a hosted community, via their community website).

1. However, these tools can be used in the publishing process, during the design and layout phase. See Appendix 5 for more information on design and layout tools.

See [Appendix 5](#) for a comparison of some layout and typesetting platforms available in 2025.

Access Repositories

Deposit your work in a repository that serves you a digital object identifier (DOI).

Depositing a static file (like a PDF) to a repository and minting a DOI is important to establish provenance and increase the likelihood of preserving your work over time.

Open access repositories solve for access and sometimes preservation, but they don't necessarily help people to discover your work. Consider producing a version of your publication that is full text searchable via consumer search engines and crawled by chatbot tools.² This may mean creating an additional access repository, such as a website.

See [Appendix 6](#) for some open access repositories available in 2025.

Platform Accessibility

As you select platforms, the [accessibility reviewer](#) should consider the accessibility needs of team members who will work on the platforms. Ask if anyone has platform accessibility needs, and test potential platforms for the features that are required or preferred on your team.

As you select a layout and typesetting platform and an access repository, consider user accessibility needs. Platforms that have accessibility features built in will make the [accessibility review](#) more feasible down the road.

[Section508.gov](#) provides tips and tools for testing accessibility in platforms.

2. Or not! I know this advice may be controversial, and it may change as the way people use AI evolves.

Version Control

Ensure that your group has an acceptable way to manage version control. Google Docs' revision history feature is a built-in version control tool that helps reduce the number of separate drafts to manage. When I use Google Docs to write and edit publications collaboratively, I create a new document at the following moments:

1. After [internal review](#)
2. Before [community review](#)
3. Before [copyedit](#)
4. During [design](#) (there may be several drafts created here)
5. After design – this is the copy that gets deposited

Further steps may be required to clearly communicate active and deprecated versions; for example, creating a new folder for each round of review and/or using a file naming convention that makes the draft sequence clear.

Data Management

Considering data management questions while planning will help you administer an ethical project:

- What is the repository of record? Where/how will the data be worked on – where all will it be copied to?
- How will we ensure the data remains private until the project is published?
- Is there any identifiable data?
- What is the most open, easily accessible, and long-term viable format that I can publish this data in?
- Does the data require software to open or use?
- What type of license will you place on the data?
- Are there any relevant privacy or ethical concerns related to the data?
- What do I need to do with the data to prepare it for public access? (anonymize, embargo, etc.)

Many university websites have further guidance on [how to ensure privacy, confidentiality, and anonymity in research](#). An example policy is the Software Preservation Network's [Data Management Policy](#).

Communicate Shared Agreements

After planning is complete, put together a project overview document that states your research goals, research questions, and any other guiding information your group needs to anchor the work. This is a landing page for the group. Over-communicate this document to the group. Pin it in your communication spaces if possible. You will return to the document as you move along your writing and publishing process.

Your document might include:

- Project goals / learning goals
- Research questions
- How we will work together
- Roster and contact information for group members
- Links to:
 - Meeting notes
 - Research and publication audiences
 - Communication spaces

When the project charter, draft timelines, and any other guiding documents you've decided to develop are complete, share them with the group. Reiterate your community agreements. Make sure everyone has access to the goals and group setup. A networked document is a great option for developing a landing page.

Considering Funding

Projects with a Budget

After designing your project, consider any roles and responsibilities left unfilled, big ideas that sounded fun but would require a budget, or timelines that seem too tight but necessary. Raising money to assist with your project may avoid burnout if some roles cannot be filled with the group's current capacity or if timelines are short.

Outsourcing whatever feels boring or insurmountable to you and your group can bring a struggling project back to life. You can fund small amounts of your project by getting the publication written into a grant project or applying for small grants.

The [AI is for Access](#) project group was awarded funding from the Society of American Archivists Foundation, and they used some of it to fund instrument development and data analysis. The Email Archiving and Preservation Interest Group funded an editor to manage community review and take their draft of [Good Practices for Acquiring Email](#) to the finish line, thanks to a regrant program for building capacity and community for web archiving from the Mellon Foundation and University of Illinois. I received funding from the [Library Futures Research Network](#) to cover my own labor to write, edit, and layout this project.

Projects without a Budget

There are many barriers to finding support for research-in-practice projects. Traditional publishing models, research methods, and other established academic norms are baked into many grant application assessment models, structurally omitting great ideas that don't fit existing professional standards. Government agencies in the United States can unfortunately be subject to political influences particularly in the past decade where there are political strategies to regulate certain work based on ideology. At the time of this writing in 2025, research funding is declining in the US. Many funders are de-emphasizing work that is not ideologically aligned with the federal administration, by both forced and voluntary compliance. This guide covers as much as possible about the publishing workflow so you can be empowered to share your work despite the difficult climate for research in the US.

Conferences

Professional conferences require funding, time, energy to travel, drafting a proposal, and being invited to speak, so it's good to start considering them during the planning phase. If you are able to work them into your project plan, they are excellent opportunities to enhance and promote your work. You can use conference sessions to engage attendees in your publication during [community review](#) and [after publication](#).

If your team does not have resources to attend national or international conferences, look to regional and local opportunities. If your team is geographically dispersed, plan for several team members to attend small gatherings in their locations. Regional or local conferences are somewhat affordable with or without a budget, and they require less carbon emissions to attend.

Many conferences offer pop-up sessions, research forums, or lightning talk presentation opportunities after the Call for Proposals has closed. Look out for communities, association bodies, or vendors that are hosting programs at your intended audiences' conferences, and reach out to them to see if there is room in their program for an overview of your work in progress. If you can't get into something already happening, you can hold your own independent pop up session as a social event over coffee, drinks, or a meal, then promote it as an independent add-on event inspired by the conference. Many conferences allow attendees to post community-organized events in their conference application of choice. Conference activities grow the community of practice in addition to generating helpful feedback. Maybe someone will even pick up a related inquiry that was out of scope for the publication, amplifying and growing the work.

The [Born-Digital Access Working Group](#) (BDAWG) often deploys this method of socializing their work. They have a natural home at their host institution's annual [Forum](#), where they workshopped their publications [Levels of Born-Digital Access](#), [Born-Digital Description in Finding Aids](#), and others prior to [publishing them](#). The BDAWG members who run these workshops typically come from well-resourced institutions that are invested in supporting the Digital Library Federation.

Developing Your Ready to Ship Checklist

After considering all the details, focus back on what the basic outcomes are for the project. What do you need to “ship” it (as they say in the software industry when releasing new products)? Make a “ready to ship” checklist for your publication to keep everyone’s eyes on the prize. Include milestones for reaching items on the checklist in your [timeline](#).

Here is a sample ready to ship list. Yours will be different based on what your author group values, what the topic of your publication is, what your audiences are, etc.

- A text that has undergone [editing](#), [design/layout](#), and [proofreading](#)
- Authors’ note describing the context and community of practice
- [Sustainability plans](#) for updating the work, and where users can provide feedback
- Community author and editors [acknowledgements](#)
- [Data management plan](#)
- [License](#)
- [Use/Re-use](#) tracking plans (internal)
- [Cover page](#)
- All links work

The [additional components](#) section provides more ideas for information you may want to gather before shipping. For more detailed information on how to deliver a clean text, see the [copyediting](#) and [proofreading](#) sections, along with their checklists in [Appendix 8](#).

Facilitation and Project Management

Organization and transparency is required for a collaborative group to be efficient, maintain trust, and stay engaged in the project.

Many of the tactics for building an open and flexible environment boil down to “be organized.” Be prepared to facilitate and maintain transparency by communicating decisions and keeping [key documents](#) updated. Setting these norms up early in the project will make it easier to keep everyone on the same page as you move along.

Keep communications and documentation direct and brief. Provide accessible summaries or lists that are quick and easy to read, while also providing links to the full information in case some people want to review the details.

Keep drafts in a centralized location that everyone on the team can access. On networked platforms, creating a central repository of documents is usually as simple as creating a folder in the agreed-upon [platform](#), sharing it with all individuals on the team, and [ruthlessly reminding everyone](#) to either create documents in the folder or move them there when they forget. A central repository or folder cuts down on the amount of individual links team members must keep up with to find project documents. Later when you develop outreach communications or presentations about your work, you will find that you have what you need to create those stories in one place.

Accessing and operating platforms can be major inhibitors to efficient group work. Make sure everyone understands [where and how](#) to work. Have a method of [version control](#) that helps group members stay up to date with the latest draft. Share the link to the latest draft often in emails or other documentation.

Communicate

Share notes from meetings and summarize decisions for everyone so they are clear on how the group is moving forward. Help prevent leaving anyone behind by communicating decisions to the whole group in writing after they are made.

Divide the Work

You can divide the work by talking as a group and coming to a natural conclusion about who will do what. It's important for people to do work that inspires them. If there's something that no one wants to do, don't force it: find another [co-author](#) or [find some funding](#) to pay someone else to do the dirty work.

Another option is to create a spreadsheet with the topics and sections and ask people to sign up. Often these systems don't get as much engagement as meeting face to face, but sometimes groups need an asynchronous sign up tool to accommodate everyone's needs.

Forms are not a recommended format for work sign ups. The goal of distributing work is to collaborate to fill all of the needs, which requires knowing what other people have already signed up for. Forms are not designed to communicate data back to the group. While it might feel organized to the coordinator to collect data in this way, most form tools do not allow participants to see and consider each other's responses.

Just as in the writing phase, each group member can take a topic or section to "own" for the [editing](#) round.

Often the same person works on the same topic or section throughout the project, particularly if the publication hasn't changed structure or section headings much since the first draft phase. But depending on the group's needs, desires, and the structure of the text, you could also re-tool who is working on what at this point in the publication's workflow. Maybe one person is sick of working on a section and wants to switch, or maybe the changing structure of the publication requires you to revisit assignments. At least take a moment to check in and reconsider before diving into editing.

Enable maximum participation

If not everyone could attend these strategic conversations who wanted to, consider an alternate way of engagement. This could be as simple as having a short phone call with them to chat about their curiosities, or asking the participant to email you their thoughts for consideration.

Manage Time

Set timelines that align with the group's capacities. When you are in control of your own timeline, you may be able to move things along at a quicker pace. On the other hand, some projects get stuck in collaborative editing hell for years, and projects can fizzle out as people get burned out or life happens to divert their attention, leaving almost-finished work on the table. But hopefully this guide is helping you avoid those pitfalls!

Prioritize Team-building

Give your team plenty of time to get to know each other. Take the time to set up as much administrative stuff as possible early, so that the rest of the project can be the “fun” part, and your progress doesn’t get held up by building infrastructure on the fly. If you are on a tighter deadline, scale small, and plan to build as you go. Never skip getting-to-know-you time in the beginning, even though that might sound like “fluff” rather than the real work. But building a rapport is crucial for any team on any timeline to succeed, and should be prioritized.

Considerations for Research Timelines

Researching together without funding is a tall order. Research takes individuals many concentrated hours of time to complete. If you are starting from the point of data collection and need to develop a survey or devise some method of gathering information from primary sources that will need to be analyzed, you have a big project on your plate. You’ll need to be patient with yourself and your colleagues! You might want to split applied research projects into two parts over at least two years, one for research design and data collection, and another for analysis, writing, and publication.

Pace your Writing

Allow for plenty of space to write. Some people can only write for short periods of time and need to take breaks in between. This is usually good for writing, because it gives the brain some time to further organize thoughts. Your writing group may be full of overworked people who are finding time to write around the edges of their schedule. Many a tenured professor have lamented that they are only able to find the space and time to write during sabbatical! You might want to break down the goal of writing a draft into smaller milestones to reach depending on the scope of your project and capacity of members involved. This could be the date by which research should be complete; a date by which you should have written 20% of your draft, etc. Individual progress can be very difficult to execute, and writing is a particularly daunting task. Depending on the needs and capacities in your group, you might want to schedule some coworking sessions to get writing done in a supportive space.

Rest

After each milestone is complete, [celebrate](#) the milestone and reward yourself with a period of rest.

Consider Time Zones

We can work together across time and geography with the help of technology, but it isn't easy. If you have a group of people that spans across time zones, you will need to consider all of those zones in scheduling.

Sometimes it is impossible to include all time zones that are present in the group. I have been in international groups that included members from Eastern Standard Time, Central European Time, and Australian Eastern Time, making it impossible to choose one time to meet that was reasonable for all. Unfortunately people in some time zones may not be able to participate synchronously, but coordinators can engage asynchronous members with specific asynchronous tasks, and email or voice recordings can help exchange feedback. The coordinator can also rotate the timing of calls so that sometimes it favors the time zones that would normally be left out of the synchronous call.

Make sure that time zones are shared when needed in communications, and consider that words like "today" and "tomorrow" do not mean the same thing across time zones. For example, our Asia-Pacific time zone colleagues are 16 hours ahead of the US east coast, basically a day's difference.

Deadlines

The person or people [coordinating the project](#) should set suggested deadlines that align with the group's capacities, and check in to remind people of the deadlines. The [Community Publishing Workflow figure](#) gives a sense of how long each step of the process takes in relation to other steps. Meetings help people honor deadlines. Schedule check ins periodically to give people a chance to talk through anything that is making them hesitate or preventing them from moving forward. Give everyone at minimum one week to respond when making decisions over email, and at least two weeks to [review documents or provide feedback](#) on longer pieces.

As you establish and move deadlines together, be kind to yourselves. While you may have some deadlines set by funders, institutional hosts, or key strategic considerations, overall the work is low stakes, and usually deadlines may be shifted. Make sure group members know that they should communicate as timelines need to shift. Shifting timelines to match capacity will prevent burnout. No matter how much time you plan out, something in the process will take much longer than you expect and timelines will be shifted, so it's no fault of anyone involved when a timeline must shift. However... you should be working towards finishing or sunsetting a project. If it feels like the timeline is getting pushed too far out and people are consistently unable to meet their commitments, check out the section on [Getting Unstuck](#).

Manage Energy

The energy in the room is an important ingredient in collaborative writing projects. The group culture will not coalesce in meeting one. Group culture is developed over time. Throughout the process, keep asking yourself how the group is building flexibility into activities, and how the project can morph to meet its participants' needs.

Accessibility

It's impossible to build a perfectly accessible space that meets the needs of everyone before the group gets started. Accessibility is an active process of checking in and being flexible. Check in periodically with the group on how they are feeling about the project and their work overall. If you are a group coordinator, make sure everyone has what they need to move forward. All group members should voice any barriers they have and share as honestly as they can how it's going for them.

Check In

Having explicit space to do check in is key for maintaining a flexible environment. Make intentional check in time on periodic agendas, especially if your meetings are usually packed with items to discuss. Your check in can be as simple as asking a question in a virtual meeting about how people are feeling about the work, and asking participants to respond using the meeting chat with 1-5, 1 being not good at all and 5 being great.

You might check in when the group vibe overall seems overwhelmed or stressed out; you might check in if there's a lot of silence or low engagement. You might check in when everything seems fine! Getting to hear how the work is going every once in a while may reveal some tweaks to your project structure or norms that improve the experience for everyone, even if it was already going well.

These are all good practices for facilitation. Facilitation is maintaining the vibe. If you are interested in developing facilitation skills, training is available from organizations such as the [Anti-Oppression Resource & Training Alliance \(AORTA\)](#).

Getting Unstuck

Writing from one brain is hard, adding several brains to the writing process is harder, and asking anyone to read it and comment can bring a mixed bag of feedback that is difficult to address. How can you keep your head up when you've been [editing](#) a collaborative publication for 6 months since [community review](#) closed and still haven't gotten to the [copyediting](#) stage?

Here are some tips to help you make it through the process.

Take stock

Take a moment to inventory what the project has in place and consider if there are any “easy” answers to why things move slowly or people experience barriers to engaging. Make sure you are [organized](#) enough that people can participate. [Set deadlines](#) to encourage progress. [Check in](#) and see if you can provide support.

It's a learning process

You are here for a learning process, and learning processes have their own timelines. Let learning take a while. The longer you work on the topic, the more of an expert you will become on the topic. As long as you have a plan – which hopefully this guide helped you put together – you know there is a finish line. To get the full benefit of a collaborative project, work through questions and barriers in community with each other. Enjoy the ride and soak up the knowledge.

You're allowed to rest

Honor rest. Take breaks between milestones. Step away for a couple of weeks if the group hits a wall. Take the publication off everyone's to do list and free yourself from the need to complete the work. When you return, join together in a meeting space and facilitate an exercise that gets people refocused, hopefully with renewed energy. Sometimes when taking time off from working on a piece, we make space for absorbing new information that creates connections and paths forward with our writing we couldn't see before.

Talk to team members when energy is low

Coordinators who are concerned about a peer's progress with completing the shared work can ask questions about what would be supportive for them. Even if you feel like you have done a lot to make resources available to the group, don't assume that everyone has what they need. Our individual needs vary. It is up to individuals to ask for what they need, and communicate with the coordinator(s) about their needs. But sometimes it can be hard for people to identify their needs, so that is one place you can start if needed, helping people identify what's holding them back. People might need help delegating, talking through the work to re-center their inspiration, or identifying that they should let go of the project altogether to allow it to move on.

If the majority of the group is too busy to hold time on their own schedules to write alone, set up some co-writing sessions. At the beginning of the session do a check in where everyone says what they're working on today. At the end regroup to see where everyone got, what barriers came up, and what their next step is. It may feel like more work to meet synchronously, but some people need synchronous meetings because they provide accountability and space to finish projects, especially self-directed ones.

Do less work than you planned

This goes for just about any project. Project ideators always underestimate some aspect of the project from the beginning: how much labor or time some part will be, like data collection, or audience identification: challenges that require more thought and time to work out than we anticipated. That's to be expected: A project plan is just an imagination; what happens is real and requires adjustments to our imagination. As you move along the project in reality, keep asking yourself how to pull back and make the project less "work" as you encounter tasks or goals that aren't working or seem to be requiring too much of your capacity. Do you even need to do the difficult task to achieve your overall goals? Maybe, but make sure to ask yourself before you assume the gruel is necessary.

If you find the project is difficult to move forward on because it has gone way beyond the original scope to the point the collective can no longer effectively manage it without burning out or extending the timeline in an extreme way, it's time to rescope. Rescoping is normal and taking the time to do it can alleviate barriers and reinvigorate participants to move forward. Revisit notes from [earlier planning activities](#) to revisit your scope.

Use the [Community Review](#) to help you accept loss instead of expanding the work. You may have to cut great work. Maybe you have drafted and received comments on a five-section document, but the fourth section needed a lot more research to complete, and the comments from the community didn't indicate a strong interest in the content. Sounds like an opportunity to cut! In your publication, you can address inquiries you've cut as recommendations for future research and work.

Work Joyfully

Injecting joy into the process is necessary for just about any project to feel fully rewarding. Community publishing work is often unpaid, and unpaid work needs an incentive on the other end to feel rewarding to the volunteer: personal growth, community connection, etc. A common incentive is that the activity is simply enjoyable to the person. Collaborative writing projects should feel joyful, so if you think this could be the group's barrier, consider some ways to inject joy into your collaborative work.

1. 🎉 Celebrate small wins and milestones alike, even if work gets done on a different timeline than you thought it would. Don't acknowledge that work is "behind" in the same space as celebrating completion of the work. Don't let those expectations you put on yourself steal the joy of doing the work you've accomplished! Share your goals with the team, and cheerlead each other as you each make progress on your contributions.
2. 🎵 Create a playlist of background music and play it at the beginning of co-working sessions or during brainstorming activities.
3. 🗣️ Doing something completely different at the beginning of the call helps people transition to the new space from wherever they came, and refocus on the new task at hand. One standard way to get people to transition to focusing on the task at hand is to ask a fun icebreaker question at the beginning of each meeting. What ice cream flavor are you today? If icebreakers are not accessible social formats for your group, you still might be able to find something for people to look forward to at the beginning of each meeting. For example, look for a five-minute game or activity that you could do at the beginning of each working session or check in. The possibilities are nearly endless on short activities that spark creativity and refocus people to the task at hand, so use your creativity, watch out for activities introduced in other spaces that you can emulate, and implement a fun component that matches the vibe and interests of group members.
4. 🏆 Is there anything that you can gamify in the work? Are there evaluation points you are measuring that could also use to motivate your team throughout the process? I don't suggest adding too much competition into what is meant to be a non-hierarchical, collaborative process, but some groups may have fun getting to a certain number of comments addressed, or a certain percentage of their writing completed.

PART III: EXECUTING THE PROJECT

Research

Equipped with the team's research questions (see [Get Started](#) for more information on research questions), bring everyone together to determine research methods and tactics.¹

For applied research, as a first step you might decide together to develop a survey instrument. Each co-author could take on a project research question and submit survey questions pertaining to the inquiry.

For a literature review, as a first step you might set up a shared citation platform (such as [Zotero](#)) and everyone adds sources to it (or you can use a spreadsheet shared on any [cloud storage platform](#) to do the same thing). Be mindful of where you source the information the project will cite. If you link to a lot of paywalled resources, your research may not be very useful to a wide audience. The group may commit to selecting only open source resources or to favor open source resources and separate paywalled citations into a subsection of the bibliography.

Before the group starts writing, determine a [citation style](#).

Co-Developing Survey Instruments

Groups need substantial time to collaboratively workshop survey questions. Expect several meetings to get from an initial brainstorm of questions to the wording that will actually retrieve the information you are looking for.

Interviews may be less time-consuming to set up than a survey, but require more than one person supporting them to make effective and useful research. Interviews should be conducted in pairs (or more) with a strong notetaker. Prepare a thoughtful system for taking notes and highlighting particularly useful information or quotations that come up. You can record the interview as a backup or to verify your notes, but rewatching recordings or relying on AI transcripts can take more analysis and time than good notes from a person who has context about the project.

1. A discussion of different research methods and how to use them are outside the scope of this guide, but many universities host LibGuides on the topic. See, for example, UC Berkeley's [Research Methods LibGuide](#).

Analyzing Data (Together?)

Analytical tasks are very difficult to complete as a group. No matter how committed everyone is to creating a shared tag library for qualitative analysis, we cannot overcome the reality that our brains interpret broad categories differently.² If you are doing qualitative analysis with a group, leave plenty of sessions for defining and understanding sentiments and groupings you will use. Dividing and conquering the analysis is often the easy part. Bringing together analysis from several different brains is the bigger challenge!

Accessibility

Consider user accessibility when choosing and designing research instruments and methods. Look at platform-determined accessibility attributes such as screen-readability when choosing the platform. Consider user accessibility measures you can take that are not platform-dependent. For example, make survey instruments accessible by deploying plain language for questions and short, direct statements for descriptive context. If the project requires a consent agreement, it should be as short and simple as possible, and can link to longer legalese in a different document if required.

Consider accessibility needs of team members when designing data analysis methods and workflows.

Protecting subjects with IRB

An Institutional Review Board (IRB) is a research ethics committee that reviews the methods proposed for research involving human subjects, to ensure that the projects are ethical. If you work for an academic institution that usually requires approval from the IRB for research, you should review your project to determine if it requires review. Many humanities projects do not, but humanities projects don't get an automatic exemption. Your institution's IRB can assist you in administering a review or determining if a review is required.

The [Born-Digital Access Working Group](#) brought archivists from several institutions together to research user experiences with born-digital archives. They knew that their project would not likely require IRB, but they still needed to apply for an exemption to follow their university policies. In a collaborative project, one institution can serve as the IRB institution of record. The group chose Yale University as the institution of record. The group chose Harvard University to host the data. The

2. The Software Preservation Network Research-in-Practice Working Group experienced this as they built a qualitative analysis model for describing attributes of [software preservation services in research and memory organizations](#).

primary concern with an IRB exemption is whether the project involves human subjects research. If you are collecting data from people (human subjects), but no data in the survey is “identifiable,” then the project may be exempt from IRB because it is determined not to involve human subjects research. At that time, Yale confirmed that they did not have to pursue IRB approval for the project because the survey did not include identifiable data. While the group ultimately looked to Yale as the institution of record, several other group members also checked with their institutions to test alignment and got similar responses from their IRBs.

Protecting subjects with a data management plan

It is important to protect research data whether or not you are required to obtain IRB approval. See the [Data Management](#) section for tips on creating a data management plan.

Write

An essential aspect of writing effectively together is understanding realistic timelines for asynchronous writing and editing – otherwise morale can dip and it can be difficult to keep writing projects moving when inspiration is low. In order to establish that timeline, the team will need to first create and understand their co-writing workflow.

Sample Writing Workflow

1. Group members collaborate to develop an outline of major topics or research questions the group wants to cover in alignment with [group goals](#).
2. Each group member takes on one (or more, as required) topics or sections to “own” for the draft round.
3. Each group member does their own research or interpretation of data and writing for their section’s first draft.
4. In a meeting or series of meetings, each group member has the opportunity to summarize what they wrote, raise questions they are left with, and take questions from the group on their work so far.

Holding review meetings where each group member has the opportunity to summarize what they wrote, raise questions they are left with, and take questions from the group helps everyone move forward. It also inspires deeper learning. These meetings are not rounds of close editing. They are early impressions and opportunities for authors to share their early barriers, and chances to give updates about how writing is going.

Edit

Editing can be the most laborious part of the process, and the overall quality of the final product is dependent on how much capacity the group has for multiple rounds of edits on the patchwork drafts that result from collaborative writing.

Internal Review

The period after creating a first draft is complete can be tough: You may not be comfortable sharing for community review yet, but you also may be unsure of how to best improve upon your work until a different person reads the draft.

Before sending a draft out for community review, you can do an internal review. The authors of [*Legal and Ethical Considerations for Born-Digital Access*](#) each authored a section of their outline, then swapped drafts. Co-authors offered early questions and comments on each others' drafts and addressed early redundancies in content.

Reviewing Internally

Co-authors should focus primarily on the content and information shared at this stage, not copyediting. Ask questions that remain for you after reading, particularly about anything that deviates from your experience. There will be time to improve the writing itself later.

Editing Internally

Address comments to the extent that you can. Update your section before the next round of editing. Make a plan for edits that require more substantial research and writing. Sometimes questions raised internally are worked on through the end of the project. The “clean” version of your text for community review may include a few open issues raised by group members for which you seek additional feedback during community review.

Creating consistencies in voice

The first internal review is a good moment in the process to discuss how you will develop a consistent voice with many different writers. The [editor](#) can review early drafts and lead a discussion or/and make recommendations on basic styles that are inconsistent. What is the tense? Who is the subject? Will you use plain language?

If you don't have an editor, you could try to maintain consistency in voice by holding a meeting where everyone brings writing samples and agrees upon a voice to emulate, also determining things like subject and tense consistency. You could also add a round of internal co-editing after the internal review described herein and/or after [Community Review](#).

Resolving Comments

Once you have addressed a comment, respond to the commenter in the document to let them know what you did. This also helps you keep track of whether or not you have resolved comments! When writers or editors respond to comments, they should note how they addressed or did not address the comment, particularly during community review when interacting outside of the co-author group. After responding to the comment, it is ready to be resolved.

Not all comments warrant an edit!

- Some are out of scope.
- Some are misunderstandings of the text, as anyone who is reading your publication for the first time understands less about it than you, no matter how much of an “expert” they are. But misunderstandings are good indicators that things might be explained a little differently.
- Some are great comments and are in scope for the subject matter, but aren't in scope for your capacity to address them. You could address the absence of the topic if you want, or you can just let the commenter know that you appreciate and agree, but it's out of scope for this work.
- Some are affirmations or questions for clarification that can be responded to but do not require an edit.

I tend to accept any edits that simplify language. When people ask for clarification, I try to revise, because if one person needs clarification, they likely aren't the only one. You may need some time to do additional research to address some edits. Talk to your fellow group members if you come across comments that you are not sure how to address, or if you need some reassurance before making edits.

Many writers will feel the urge to address all comments and ideas that they have open before moving to the next round of editing, but this is not necessary. Before moving to community review, consider these primary checkpoints:

- Make sure that all/most suggested in-line text edits have been accepted or rejected.

- Ensure that all resolved comments have been responded to, checked off, and the commenters added to an Acknowledgements list.
- Leave open comments that have not yet been resolved.

Community Review

Edits inspired by people at various points in their career and knowledge paths and who work across different institution types and geographies — and potentially even different disciplines, depending on your intended reach — make work more understandable to a wider audience. An open model of peer review can provide a mixed bag of edits to consider, but as many hands make light work, you can alleviate the burden with a solid [writing](#) and [editing](#) crew and good [project management](#).

It can be difficult to move from editing to community review, because there is always more editing that could be done. Here are some tips for moving from editing to community review.

1. Set a hard deadline for section editing before the document is closed to prepare for community review.
2. Determine what additional components the publication will have. Use the [Ready to Ship List](#) and [Gathering Additional Components](#) sections to make space for this information in your layout and in your work plan.
3. Develop an outreach plan for the Community Review period.

The Community Review Process

What might your community peer review process look like? Here is a template version of the workflow I use:

1. Create the [Community Review file](#).
2. Share the newly-created Community Review document with the group for approval before kicking off community review emails.
3. Open permissions on the document and send it out for community review.
4. Take a couple weeks' break from the project.
5. Send reminders about the open feedback period. Work on sections that are not part of community review, such as [front matter](#). Execute other parts of the [outreach plan](#), like [conference](#) attendance.
6. When it is time to end community review, change permissions on the document to remove access from community editors.

Creating the Community Review File

Create a new document and make sure everyone in the group has access to it (if using a networked platform). Create section headings for each main section of the publication, including [Additional Components](#). If drafts are still scattered across several documents from the first draft and internal editing phase, combine individual section text into the new draft.

Transfer open comments from the previous round of internal editing, if applicable. If you need to click off some open comments that you still intend to address for whatever reason (often to reduce clutter on the page for readability), you can do that because you created a new draft, and the previous draft(s) should contain all unresolved comments from the previous round of editing (see [version control](#) for more notes about when to change drafts vs work within a draft).

Consider what context you might need to add to the community review document for the audience to understand where you are with the draft and what you want them to do with it. Some examples of contextual information includes:

- Instructions on how to make comments on the document.
- Discussion questions to guide the reviewers' comments.
- A policy for where the document can be shared during community review.
- Selectively use comments to highlight particular section(s) you want people to focus on, but generally keep open comments to a minimum to reduce the clutter on the page, which can prevent some people from focusing.
- What community reviewers can expect when the document closes, i.e., "After the review period, the link will no longer be public, but all commenters will receive notification when the published version is available."

For [additional components](#) not yet drafted, keep the heading and include a comment or short note that content is under construction and will be added after community review.

See the [community review lead](#) role for more information about the role of leading community review.

Community Review Outreach Tactics

Go back to the conversations you had when you were first getting the gang together about your intended audience. Ideally as a group, brainstorm a list of listservs, individuals, or other contact points that match your audience. Determine who in the group has access to each community or platform and can be a steward of information about the project to that community for the duration of your work. Determine which audiences or communities will be targeted for community review. See [Appendix 9](#) for a template outreach spreadsheet.

Determine what you want the community to focus on during their review, and include this information in the call for reviewers. You may want to state that copyediting will be completed at a future date, and ask reviewers to focus on the content if possible. But it's also okay if some people disregard this guidance: colleagues will help from wherever they are and with whatever they can contribute. Sometimes that is eager copyediting over a lunch break rather than deep critique with morning coffee.

Draft an announcement and ask the group to review and co-edit the draft. Use email or in-person outreach to share the document for community review. Ensure that all links within and to your document are live. Ensure that the link to your community review document is the document you intend to use, with the right permissions! (You might want to test this with someone outside the core group before blasting listservs).

During Community Review

Community review should last long enough to encompass your outreach plan: at least a month, but as long as the team needs to get the feedback they desire. Send a couple of reminders over the community review process. Sending a reminder the day before review closes is often an effective moment to generate late interest. If you have a large outreach list, you can reduce the scope for reminders to the few lists that you think will have the most uptake.

It's helpful to have attendance at an [in-person event](#) lined up during the community review period. Presenting the work in progress at a conference and asking for feedback will increase the amount of engagement you get from community review. Many colleagues may be interested in your work but overburdened with day-to-day activities. Given the time and space that a conference or professional gathering affords, many colleagues become more open to providing feedback and engaging in the work.

The most important thing to do during community review for co-authors is to rest! This is a great time to step away from the project completely and renew your energy for it. If you have a conference presentation or other outreach to work on, which is labor and not rest, consider establishing a long community review period. Schedule a few weeks' rest for yourself in addition to the conference time.

Closing community review

When it is time to close community review, change the permissions on the document to disable public editing. Some colleagues will try to provide feedback after the due date and request permission for the document. This is an excellent outreach opportunity! If the volume of requests fits within your capacity, thank them for their interest, explain that the review period has ended, and ensure that they will receive information when the work is published. Add them to a list of contacts for publication marketing outreach.

Editing after Community Review

With community review closed, it's time to review the comments, discussing their contents and the edits they propose. Come up with a shared workflow for how you will address comments and make sure that this workflow is understood by all authors. Then [divide the work](#).

Here is a sample workflow for address comments after community review:

1. [Editors](#) review comments and in-line suggested edits to the text. They maintain a list of all commenters for an Authors or Acknowledgements section of the publication.
2. [Writers](#) and editors determine whether to make the edits that each comment suggests. They [accept or reject](#) all suggested in-line text edits.
3. Create consistencies in voice.

Collecting Acknowledgements

Wait to close any comments until all contributors have been recorded somewhere for acknowledgement as community editors and you have discussed the most difficult conclusions with your co-authors. Record community editors' names and email addresses so that you can inform them when the publication is released and thank them for their contributions.

Additional Components

You've completed community review, and all comments have been addressed. You've got a near-complete draft! Now consider additional components that you want to include in your publication. You will need to start gathering them soon in order to have them ready to go when it's time you publish. These components are important to discuss with the group.

Authors' note

The authors' note should describe the authors' context and, if applicable, their community of practice. Who are you? Tell them a little about how you got started on the research inquiry or what the motivation was for developing the resource. If you are publishing within a certain community of practice, explain that. If you are a rag tag bunch of misfits with no masters and no central home, still explain that!

If you aren't transparent about who you are, people might get the wrong idea. Are these authors secretly employees of a business peddling a software they mentioned somewhere in the publication? Are they part of a special exclusive club? These perceptions can be hedged with an authors' note. For further transparency, add a [contact pathway](#).

The authors' note can go in the front matter of the publication, or as part of the introduction. In this guidebook, I included my contextual author's note [in the Introduction](#).

Data management plan

Consider including your data management plan as a secondary attachment to your publication. If your repository doesn't have the functionality to relate a separate data management plan to your publication, consider adding a section to the front matter of your publication that briefly describes the plan.

Sustainability plan

Not everything has to be a never-ending project, but practices change and sometimes we want to make room for the changing nature of our work. Share any sustainability or feedback plans for updating the document, including where readers can go to provide additional feedback. Consider how you will take further comments or requests for review or even removal as previous good practices or ideas become superseded by better ones, particularly if your research is entering a new area. Levels of Born-Digital Access is an example of a publication with a sustainability plan.

Your group may not feel that it is necessary to update the document over time, fully accepting that what felt true and right today will change over time. Some authors mark the moment-in-time-ness of their work in a similar type of note. As the [Examples of Born Digital Description in Finding Aids](#) project states on its home page, “This is a snapshot of practices and is not intended to change or update over time.”

Contact pathway

Regardless of whether you intend to update the work, you should still consider a way for people to provide feedback. Don’t assume the feedback you receive will always be criticism. You may hear notes of thanks for the work and gain insights about who is using the work and how.

You do not have to share specific contact information, like an email address, to provide a contact pathway. In *Levels of Born-Digital Access*, the authors direct readers to submit feedback to the current coordinators of the Born-Digital Access Working Group, who can be found [on the DLF BDAWG web page](#).

Acknowledgements

Honor at least two groups of contributors in your acknowledgements. Acknowledge these people in separate sections.

1. Co-authors who wrote and edited the publication
2. Everyone who commented during the community review period

Who else helped? There may be others who have contributed to the project beyond the writers and community editors, like subject matter experts or professional association staff. “[Decentralized Infrastructure for \(Neuro\)Science](#)” is an excellent model for how to honor all the different contributions that go into a paper.

License

Many self-publishers use Creative Commons (CC) licenses to license their work. There are currently six options for CC licenses, which you can review on the [Creative Commons website](#). Further guidance is found across many academic library LibGuides, for example the University at Buffalo’s [Creative Commons Basics guide](#).

For example, this publication has a CC BY-SA license. This means that anyone can use it, but they must give credit to the creator, and their adaptation must be shared under the same license, CC BY-SA. CLIR publishes their [Pocket Burgundy](#) series with CC BY-NC-SA licenses, adding a requirement that only noncommercial uses of the product are permitted.

CC is not the only licensing option, but it is a fairly common one for self-published work.¹ Discuss licensing options among the team and choose one together.

Citations

Choose a citation style together, or assign this job to someone in the group. The method of citation doesn't really matter, but citing your sources and providing credit to the knowledge that came before you is very important. Different disciplines have preferred citation methods. [Purdue OWL](#) is a good resource for APA (American Psychological Association) and MLA (Modern Language Association) styles, and the [Chicago Manual of Style](#) is also available online. Tracking citations in [Zotero](#) can make building the bibliography a quick task at the end of the project.

Credit all images used throughout the publication, and follow any use policies available on images that you use. See the [cover page](#) section for more information.

Repository Metadata

Consider what metadata you will need for depositing the publication and minting a DOI (Digital Object Identifier), based on the [repository you have chosen](#). Most open access repositories include few requirements for metadata, but have options for enhanced description and context for your work. You will need to craft some new information such as an abstract or summary and tags, and you may need to coordinate additional information from authors. Some common metadata to include in open access publications is:

- List of co-authors, with co-authors linked to their [ORCID](#)
- A description of the publication
- License
- Tags or subjects
- Funding or institutional host acknowledgement

1. If the project has produced research software, see Harald von Waldow's [Research Software Licensing Guide](#).

Copyedit

After addressing comments from the community review and gathering additional components, it's time to copyedit. You can split up the work among several co-editors or have one person take on the task. Turn the publication into [plain language](#) by addressing wordiness, syntax (the order of words), transitions, and removing passive voice wherever possible. Consider splitting compound sentences into multiple shorter sentences for readability and directness. Address typos, grammar, and spelling mistakes.

Try to avoid jargon, even though your audience may be familiar with the jargon. It will help your writing become more specific. Readers will quickly understand the impact of your work, no matter how knowledgeable they already were.

See [Appendix 8](#) for a copyediting checklist that the copyeditor(s) can use on your publication.

Design

Cover Page

Create a cover page image. For a basic cover page, you can pick a background color, place an image on the top or bottom half of the page, and place the title in the remaining space. You can use free software like [GIMP](#) to create images. [Canva](#), another graphic design option, has a limited free license, is more user-friendly, and as a networked platform is less secure than GIMP.

First consider if there are any images related to the content of your work that you could use. Check institutional collections. Archival collections are often full of textual records, so it can take patience to find illustrations or visually interesting documents. But using them creates meaningful covers.

CLIR (Council on Library & Information Resources) staff created the cover page of [Archivist Actions, Abolitionist Futures](#) using an image from an archival collection showcased in the publication. The cover of [Good Practices for Acquiring Email Archives](#) includes an image acquired from the University of Nevada, Reno's special collections of students using library computers in the early days of email.

Maybe your research is on a new topic, or maybe centering historical relevance is not part of the project. In publishing with Educopia, we often created a cover page using an image from a free or low-cost stock photo collection. The [Creative Commons search portal](#) searches across several platforms of CC-licensed images. There are many free stock image collections including [Unsplash](#) and [Freepik](#). [Vecteezy](#) has vector images, open source illustrations. Visualize a metaphor for your publication. Search keywords that exude the vibe of the project or a metaphor for it.

After selecting an image, credit the creator and take any further measures required by the image's license. For digitized archival collections, most institutions try to provide as much usage information as possible so that you do not have to contact an archivist for permission, but you may, depending on the institution's policies and the image you have chosen.

Layout and Typesetting

Layout and typesetting are significant challenges in DIY publishing. There are very few open source or free software solutions for doing this task. In my community publishing projects, either someone on the team had access to [Adobe products](#) through their institution, or the host institution used desktop publishing software (usually Adobe products) to lay the publication out. If you are using a platform that only one person can access, the work shifts from everyone having access to the infrastructure to make direct changes during writing and editing, to working through one designer during layout.

Layout and typesetting may involve considerable copying and pasting, reformatting, wrestling with hierarchical lists, and inserting links. Consider accessibility as you select designs (a full [accessibility review](#) should be performed after design). Be patient with the team member or institutional host staff leading this work, and give them an extra big thank you at the end!

One “free” option (that requires significant labor from the team) is to design your own publishing template. A markdown template is useful because it can work in many different systems and static website generators. It is easily converted to PDF or HTML through free software such as [pandoc.org](#). A Google Doc template can also work well. *The Librarian’s Guide to Micropublishing*¹³ includes extensive guidance on how to establish specifications for font size, character and line spacing, and many other aspects of layout for writers using Microsoft Word.

See the [Platforms](#) section for more information on selecting layout and typesetting software.

Accessibility Review

Remediating for accessibility may introduce minor text errors, so conduct an accessibility review after the layout is complete but before proofreading. [Section508.gov](#) has extensive guidance on how to develop accessible documents in a variety of different formats and how to apply universal design to your outputs, including specific free tools you can use to help you perform the accessibility review.

¹³ Walt Crawford, *The Librarian’s Guide to Micropublishing*.

Proofread

Errors will be introduced during typesetting and layout. These errors emerge when the publication includes components such as:

- Text copied and pasted from a formatted document
- Links in the document
- Ordered (numbered) and unordered (bulleted) lists, plus any additional hierarchy within lists
- Headings that had to be re-coded during layout
- Different fonts for headings and body text

See [Appendix 8](#) for a proofreading checklist you can use.

The proofreader checks for grammar errors and typos. Check for errors introduced using track changes throughout several drafts. Review section numbering and appendices for consistency in format and correct references. Click all links to ensure that the hyperlinks work and go to the intended URL. Eyeball line and paragraph spacing to make sure it is consistent. Ensure that heading and body fonts are consistent. Look out for any symbols, quotation marks, and non-English characters whose formatting has gotten corrupted through many draft transformations.

As you perfect your text, also understand that it is okay to let some of these errors slip through the cracks. At some point you will just need to [ship](#) the publication to avoid burnout, and if there are any errors big enough to address later, you likely have the option of updating the draft in your repository of choice.

My goal in sharing these checklists is to illustrate specific mistakes you can look out for, potentially speeding up your copyediting and proofreading processes. It's okay to have some typos. Kind colleagues from whom you desire respect will not write you off because of a typo or formatting blunder. Most readers will not notice typos. But the more clean and consistent your DIY publication is, the easier it will be for readers to trust the information. See [Appendix 8](#) for a proofreading checklist you can use.

Deposit

Deposit the publication into the repository the team chose. Share the DOI with the group to insert into marketing and outreach messages. Ask the project team to review the metadata for completeness and correctness.

The repository manager may want to assign more than one administrator to help prevent losing the keys as time moves on and people move around to different institutions and contact information.

See the [Repository Manager](#) role description for more information.

Share

Outreach and Marketing Strategy

Talking to people one on one about your work and sharing it via your personal network is key to getting the work out there. As [Cory Doctorow notes](#), comments, replies, emails, and discussions about the work mean more than clicks. See the [Additional Components](#) section for more thoughts on how to measure use of your work.

Social Media

Social media raises awareness about your work. It may not get people to directly read or use your publication, because social media platforms are not designed to encourage sustained attention. Some useful places to share your DIY academic work are LinkedIn and the Fediverse/Mastodon. People look for new information in their field on LinkedIn, and it connects your work to yourself if you have a LinkedIn profile. Mastodon and other Fediverse applications are not algorithm-based. The success of any social media platform depends on first building a network to ensure visibility. Tag co-authors to increase engagement and awareness when posting. Depending on the platform, co-authors can re-share the announcement.

De-center social media digital marketing that relies on algorithms in your outreach plan. It's great to post on as many communication platforms as possible, but it may not serve you to pay for visibility on those platforms or optimize for them.

Plan for a Press Tour

Consider holding a launch webinar. You can coordinate with a community of practice or allied professional association working group/committee to co-sponsor an event for their members that shares your resource. For a more lowkey approach, you could ask for time on relevant group agendas to present your work at their next meeting. If you have a launch event date determined before sharing the publication, you can include event registration details with the publication announcement.

If your group has the resources and capacity to present the work at an upcoming [conference](#), do it! You will reach your target audience in person and get quality feedback on the work.

As you brainstorm possibilities for your press tour, it's great if you come up with activities that are far in the future. After shipping the publication, you can get the group back together periodically to further use your work in the community. Slow outreach will ensure your publication or resource is used over time.

Ship It

You have a list of groups to contact from [community review outreach](#) (see [Appendix 9](#) for a template). Use this list as the base for your publication announcement list. Your publication announcement list should include:

- New audiences identified since the community review process
- Audiences you want to share the publication with that you did not engage in community review
- Individuals you know to be interested in the topic
- Individuals you cited in your work
- Everyone who commented during the review period
- Co-authors can send to their institutional team members and close colleagues

The outreach coordinator should split up assignments to reach different audiences, providing tools such as a communications template and any special instructions on how to present the announcement. It might be scary for some team members to hit “send” on that big listserv message, but it's good for people to see your name associated with the work!

Share the work on selected social media platforms, and interact if anyone comments.

Rest again!

Congratulations, you've made something and put it out into the world! Even if you feel energized to keep working on it, try to take a break from the project for a month or so before starting your [press tour](#).

Track usage

Track engagement over time to measure the impact of your work. Many repositories track downloads or other engagement measures. Linking your publication's DOI to your [ORCID](#) account can help you understand a bit about usage. Favor non-commercial ways of tracking engagement that do not require purchasing or selling/releasing personal information.

You want to know are people using your work. Understanding usage helps you express the value of your work to bosses, future employers/clients, and other people who care about your impact. Usage information drives work improvements and can guide future projects.

Consider a light reuse tracking plan. You could follow up with your community of practice in a year to ask for stories about how they have used the document. They could fill out a survey, or you could meet one on one with people and hear about how they used it. If you commit to usage tracking, you can mention your plan in a [front matter section](#) of the publication.

For an example of a usage study, see the National Digital Stewardship Alliance's [series](#) on how their community of practice uses the "[Levels of Digital Preservation](#)."

Conclusion

Community publishing builds communities of practice and shared knowledge and is a great option for people who thrive with full agency and creativity over their work. It builds resilience and solidarity for research networks that do not heavily rely on our institutions, at a time when institutions in the USA are experiencing uncertainty. That's not to say that even this DIY process does not rely on institutions: in most cases, the examples shared herein are authored by employees of archival institutions, many of them academic institutions. These organizations provide the financial security for their staff to engage in community publishing. They often provide the infrastructure of meeting spaces, platforms, and other research support. I am grateful to all of the institutions who support their staff in participating in whatever research activities they like, and who support the communities of practice that their staff nurture. They are an essential part of the research ecosystem. But right now, it's good to build resilience and solidarity amongst ourselves as we look to an uncertain future about open, values-based research networks supported by institutions who are at risk of losing funding if they support values-based research at all.

This guidebook was, ironically, mostly written alone, although I tried to follow as much of my own advice as possible. I did a modest literature review, and I made a list of subject matter experts I wanted to consult for the project. I planned to do a round of internal review with the [Library Futures Research Network](#), then a round of community review on select listservs. It turns out that this was a tall order for a single author to manage! I had never attempted to do something like this on my own, without a group of people to split up work with, and it was a real learning experience to go through every single step myself. I chose Google Docs to write in, and PDF on Library Futures' website and Zenodo as my access repository. I chose Chicago style for citations, a departure from my field's typical usage of APA. I got stuck after my first draft, but then I had really insightful focus group conversations that helped me figure out how to move through the editing process. Nearing the end of the project period, I decided I had enough feedback to finish the publication. I skipped both an internal Research Network review and open community review. I am open to making changes if any factual errors have occurred that might have been mitigated by a community review.

Thanks for reading!

Appendix 1: Examples of Community Publishing Projects

Project Title	Models for Community Publishing
Levels of Born Digital Access	Open community peer review Sustainability plan
Good Practices for Acquiring Email Preservation	Open community peer review with acknowledgements of reviewers Plain language, including a glossary of jargon
NDSA Levels of Preservation	Open community peer review Post-publication Qualitative usage study
Decentralized Infrastructure for (Neuro)science	Open community peer review, including the ability to continue the discuss through post-publish Custom typesetting; openly searchable on the web Community acknowledgements
Digital Preservation: A Critical Vocabulary	Open Community peer review for a monograph
Supporting Software Preservation Services in Research and Memory Organizations	Collaborative data analysis, generation of new vocabularies through communities of practice

Appendix 2: Introductory Call Sample Agenda

Introductions and sharing about why you were interested in working on this project

Project discussions:

- What are your project goals or learning goals?
- What are your research questions?
- Who is our intended audience for the research and publication

Team member reflections:

- What support do you need to contribute to this project?
- What is your individual capacity and interest to contribute to this project? Can you pair time on this project with other work or research activities? Can you imagine how many hours per month you can dedicate? How often can you meet: quarterly, monthly, or more frequently than monthly?
- What communication methods work best for you?
- Determine a regular meeting schedule and time (or send a poll after the meeting)

Appendix 3: Sample Community Agreement

This agreement was developed by the BCC python study groups pilot phase coordinators. It was modeled (roughly) on the Aorta Collective's "[Anti-Oppressive Facilitation for Democratic Process Community Agreement](#)." It is published here with permission from the authors. The [Right-sized Agreements](#) includes a story about how this agreement was implemented.

Python Study Group Community Agreement Template

- Collective effort, individual responsibility. Everyone learns at different paces and in different ways. With the understanding that 'no one knows everything – together we know a lot', we commit to supporting one another as we work toward our shared goal of improving our technical skills. We contribute to this effort by checking in with team members to ensure that no one feels 'lost', and by being mindful of how our individual actions contribute to the group's success. For example, being mindful of not dominating the conversation or giving advance notice to the group if we have not completed an assignment or cannot make a meeting.
- One goal, many solutions. There are many different approaches to a problem and oftentimes there is no single 'correct' answer. If a solution works, it is valid. We do not discourage alternate implementations or round-a-bout methods, even if there is a more elegant, efficient, or widely used approach.
- Create a welcoming space. Learning is difficult when participants do not feel comfortable, welcomed, heard, or accepted. We create a safe space for team members by engaging in respectful communication and being supportive of one another's needs. We do this by using technical tools like the raise-hand feature on Zoom and facilitation strategies like progressive stacking and consensus decision-making to ensure that only one person speaks at a time and that no one is dominating the conversation. We also follow the [BCC Code of Conduct](#). Conducting regular temperature checks gives everyone a chance to weigh in or review before moving on to new materials, and allows team members to be open about their needs.

Appendix 4: Sample Writing and Editing Platforms

Platform	Synchronous editing	Version control	Suggest mode / track changes	Comments	Transfer comments to new doc	Do they sell your data?	Technical requirements	Cost to user
Cryptpad	Yes	Yes	Yes	Only for paid versions.	? Possibly for paid versions	No	Computer with internet, familiarity using networked platforms like Google Workspace	None, but paid services available
NextCloud	Yes	Yes	Yes	Yes	?	No	Choose a free host	None, but paid services available
OnlyOffice	Yes	Yes	Yes	Yes	?	No	Home server setup	None, but paid services available
Obsidian Sync	Yes	Yes	No (community plugin could be developed)	No (community plugin could be developed)	No (community plugin could be developed)	No	Writing in markdown, installing plugins	Low monthly fee
Zettlr or obsidian	Yes	No. Add git to workflow for version control	No (community plugin could be developed)	No (community plugin could be developed)	No (community plugin could be developed)	No	Writing in markdown, installing plugins, using git for version control	None
Microsoft 365	Yes	Yes	Yes	Yes	Yes	Yes	License	Medium monthly fee
Google Workspace	Yes	Yes	Yes	Yes	Yes	Yes	Computer with internet	None, but paid services available

See the [Platforms](#) section for more discussion on choosing platforms.

Appendix 5: Sample Layout Platforms

Platform	Theme and Layout options	Optimized for print?	Cost to user?	Do they sell your data?	Technical requirements
Cryptpad	minimal	No	No	No	Computer with internet, familiarity using networked platforms like Google Workspace
NextCloud	minimal	No	No	No	Choose a free host
OnlyOffice (OnlyOffice is a component of Cryptpad and several other privacy-focused cloud document platforms.)	minimal	No	No	No	Home server setup
Obsidian Publish	Must develop your own template	No	Yes	No	Writing in markdown, css
Zettlr	Must develop your own template	(Yes?)	No	No	Writing in markdown, installing plugins
Google Workspace	average	No	No	Yes	Computer with internet
Microsoft 365	average	Yes?	Yes	Yes	License
Adobe suite	robust	Yes	Yes	Yes	License
PubPub	robust	No	Yes	?	?

Appendix 6: Access Repositories and Methods

Some places where you can deposit your work include:

- [Knowledge Commons](#)
- [OSF \(Open Science Framework\)](#) (example: [DLF Born-Digital Access Working Group](#))
- [Zenodo](#)
- [PubPub](#) (example: [Digital Preservation: A Critical Vocabulary](#))
- Your institution's institutional repository
- Your writing and editing documents platform, if it has a "Publish" feature (i.e., Google Docs)

If the team possesses web development skills, consider creating a website for your project. The Born-Digital Description project group (of the DLF Born-Digital Access Working Group) [created a WordPress site](#) to showcase their work. [Static web site generators](#) support text delivered as HTML, so they are also great options. The markdown editors featured in the charts all produce files that are easily rendered on static websites.

[Pandoc](#) is a good tool for converting documents to HTML (and many other formats).

[GitHub](#) + GitHub Pages is a toolchain that can host resources, control versions, and generate a hosted static website all in one place.¹⁴

Any author can establish an authority record for themselves called an ORCID. Linking your publication's DOI to your [ORCID](#) account can help you understand a bit about usage of the publication.

¹⁴ If you are concerned about how GitHub, owned by Microsoft, might use your data, [Codeberg](#) is an alternative option for hosting and using git to control versions of your publication.

Appendix 7: Sample Ready to Ship Checklist

Sample [Ready to Ship](#) Checklist:

- A text that has undergone editing, design, and proofreading
- Authors' note describing the context and community of practice
- Sustainability plans for updating the doc, and where users can provide feedback
- Community author and editors acknowledgements
- Data management plan
- License
- Use/Re-use tracking plans (internal)
- Cover page
- All links work

Appendix 8: Sample Editing Checklists

Copyediting Checklist

- Edited for jargon
- Edited for passive voice
- Edited for plain language
- Address any remaining [inconsistencies in voice](#)
- For international author groups, address consistencies in language (for example, if you are writing in English, make sure spellings are consistent with the chosen English variant)
- Typos
- Grammar
- Spelling
- Punctuation
- Capitalization

Proofreading Checklist

Once [layout and design](#) is complete, proofread. Check to be sure that:

- All hyperlinks work
- Line and paragraph spacing is consistent
- Fonts are consistent
- Headings are the correct level (H1, H2, etc.) and wording

And address any lingering errors with:

- Grammar
- Spelling
- Punctuation
- Capitalization
- Formatting
- Layout
- Consistent formatting for citations
- Consistent formatting for in-document links
- Consistent formatting for abbreviations and other context-specific data forms (for example, if you are writing a technical document talking about file formats, all formats follow a similar

pattern of .pdf, not PDF).

- Typos, errors introduced with track changes
- Numbering of sections and appendices is consistent
- All hyperlinks work
- Line and paragraph spacing is consistent
- Heading and body fonts are consistent
- Symbols, quotation marks, and non-English characters display

Appendix 9: Template Outreach List

[Download the template in Excel format.](#)

[Download the template in LibreOffice format.](#)

Or find links to both templates at <https://pubs.libraryfutures.net/publishyourpaper/back-matter/appendix-9-template-outreach-list>.

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