

## JACoW OPERATION AND ORGANISATION

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### INTRODUCTION

JACoW, which will be fifteen years old in a few months, has become the most important open archive resource in the field of accelerators. The facilities and services provided by the team cover a wide range of activities and are based on the goodwill of team members and support from accelerator institutes and conference series. With a number of the founding members approaching retirement it is time to look at the way in which to best ensure the continued success of JACoW. Since I will not be able to attend the Team Meeting in Shanghai, I am setting out my ideas and in this note I will review the current situation and propose a way to re-organise the collaboration and ensure continued success.

### CURRENT SITUATION

The aims and objectives of JACoW are:

1. Publish high quality sets of proceedings with access through the custom interface.
2. Train and educate authors and editors.
3. Provide a repository of profiles.
4. Support for conference organisers.

In order to achieve these aims and objectives the collaboration carries out the following activities:

- Provides and maintains the proceedings website.
- Publishes new proceedings as soon as possible.
- Runs the collaboration.
- Provides and maintains the author and team websites.
- Provides and maintains JPSP.
- Develops new tools for editors and authors.
- Tests, documents and promotes the use of new software.
- Provides and maintains the repository.
- Provides and maintains the SPMS.

Currently there are about 120 conferences published on the website and this is meeting our primary objective. Editor training is done at the Team Meeting and at larger conferences where novice editors are invited to work alongside more experienced people. Behind the scenes there is intense activity analysing, reviewing and developing software and tools for proceedings production. Author education is achieved through feedback at conferences and from the information published on the website. The profile repository is the central backbone of the SPMS and now contains 28,000 individual profiles and 3,700 affiliations.

Support to conference organisers concerns both physical support in the running of the event and the provision of tools like SPMS and JPSP and is made on a goodwill basis with costs covered by the conference, if necessary.

### CURRENT PERFORMANCE

The provision of all of these facilities and services relies on the goodwill of a few individuals and the support of accelerator institutes. To the accelerator community it probably seems that JACoW is functioning very well and this is true as far as the front line activities are concerned. However, the operation of the collaboration is starting to show signs of strain as people become stretched to their limit and others leave the collaboration. The continued success of the collaboration needs proactive participation to drive new developments, feed new ideas into the team and to keep pace with developments in the domain of electronic publication. At the same time, conferences are making more demands on team officials to help with conference organisation and proceedings publication. As a result, technical and organisational issues have been overlooked and there is a danger that the collaboration will grind to a halt.

### ADDRESSING THE CHALLENGES

I think that the solution is a number of simple managerial actions. I now feel that as the founding chairman, I should probably have set up a more rigorous structure for the team. In the early years I was able to carry out many of the tasks myself and Christine was able to do most of the rest. I see that there are some areas where people need to be given the responsibility for certain activities, which up to now, were implicitly done by the Chairman and Coordinator. Furthermore, there is a risk of losing expertise as people retire. Finally there is a need for succession planning and to have a development plan for the Team. There are already several young and enthusiastic members of the team and they need to be encouraged to bring their new ideas and techniques to the collaboration and to play a more active part.

In the following section I propose mandates for a number of new officials and I hope that this will address the specific issues which I have observed in the last 12 months. The introduction of new officials is, in effect, only a reorganisation of the structure of the collaboration but I believe that one should go much further with this. Basically, I am proposing to introduce a new level of management in the collaboration - a board of directors. The directors should be people who will bring experience and vision to the collaboration and provide a degree of continuity. There should

be at least three directors. It may also be useful to designate other officials, who will have specific responsibilities for example, a scientific secretary - responsible for documenting meetings and management decisions, a website content manager - responsible for the continuous review of information published by JACoW and so on.

Implementing changes to the collaboration like those mentioned above will bring a clearer line of responsibility to the organisation. One might even draw a parallel with the organisation of a large scientific collaboration. Although JACoW will never be funded and self-supporting, I think it is worth examining the organisational structure in this light. One has a leader of the collaboration (chairman), a council or advisory board (board of directors), and the officers. If one thinks of the members as contributing institutes – then these correspond to the stakeholders in JACoW, currently the steering committee.

One might also think about having a 'President' (like a spokesperson in an experiment, but more of a figurehead). This would be an honorary (rather than executive) position but one should invite a person of international high standing in the accelerator world who would be a champion of JACoW and be able to gain support for JACoW at the level of institute directors or even at international (government agency) level. Although it would be an honorary position, we should expect the President to help the collaboration both politically and even perhaps in finding resources. There are a number of potential candidates for this position.

## OUTLINE MANDATES FOR JACOW OFFICIALS

### *Chairman*

- Lead the collaboration
- Ensure that decisions and actions are followed up

### *Deputy Chairman*

- Assist the chairman in the execution of his duties
- Stand in for the chairman when he is unable to carry out a task

### *Directors*

- Review operation of the collaboration
- Review and approve changes to the collaboration and its activities
- Determine the agenda for annual Team Meetings

### *Coordinator*

- Organise meetings
- Communicate information from the board of directors to the collaboration
- Feed information to the board of directors

### *Scientific/Company Secretary*

- Record and publish actions and decisions of the Team Meeting, Steering Committee and Board Meetings
- Prepare the agenda for team meetings

### *Regional Representative*

- Present the views and requirements of the region to the collaboration
- Assist the chairman and directors in activities related to their region

### *Regional Webmaster*

- Maintain the JACoW Website
- Verify and publish new proceedings
- Answer user complaints
- Maintain the JACoW.org domain name (one region only)

### *Regional Support Manager*

- Set up new database instances for new conferences
- Respond to user queries

### *SPMS Support and Development Manager*

- Maintain the SPMS instances
- Maintain the SPMS code
- Develop new functionality
- Answer user complaints

## ROAD MAP FOR THE FUTURE

Something which has become blurred in recent times is the separation of responsibilities between the collaboration and the conferences. It should be emphasised that JACoW was created as an open archive for information supplied by the conferences. It is the conference's responsibility to produce the proceedings and whilst the collaboration may be able to help by providing tools, software licenses etc. it is not their primary function to provide manpower, especially if this will have a negative impact on the operation of the collaboration.

I believe that it is important to introduce some changes now in order to ensure efficient operation in the immediate future and to provide continuity. Some of the changes are quite far-reaching and will need discussion with a wider audience. As a first step I recommend introducing the notion of directors and forming a board of directors. The board should be an idea factory and a decision making body. It should be chaired by the JACoW Chairman and should comprise the directors, Deputy Chairman the Secretary, Coordinator and Regional Representatives. The Board members should serve for a period of three years and their mandate should be renewed by the Team at the Annual Team Meeting. If necessary, this can be accomplished without making any formal changes - the task can

be achieved if people are asked to do the work (as an advisory committee) even if the Board of Directors has not been formally created. Decisions should be taken by the Board on the basis of a simple majority and the Chairman should have a vote.

It is important to formalise these changes and to review the modus operandi of the collaboration. Currently the situation can be summarised by saying that the Team does the work and the collaboration (team) reports to the steering committee through the chairman. Currently Steering Committee approval is required for any changes to the collaboration. To some extent the dynamic nature of the steering committee membership makes it less effective - members may only serve for a few years during which time they may only attend one or two meetings. In many cases the steering committee members do not fully understand the workings and complexities of the JACoW collaboration.

In the longer term, I believe that it would be in the interest of the collaboration to have the Board of Directors as THE decision making body. This leaves open the question of accountability - does the collaboration need to be accountable to anyone? I believe that the primary stake holders are the institutes (paying their staff who are working for JACoW) and the accelerator community which uses the JACoW website. Perhaps holding a stake-holders meeting at the international conference each year would provide an adequate channel for accountability - the Chairman could report on the year's activities and stake-holders could raise issues if they wish.

The appointment of a President could be very beneficial and will increase the awareness of the collaboration. Once again, this is probably a step which will have to come at a later stage in the transition to the new structure.

In summary, the road map to the future for JACoW starts with seven major steps (assuming agreement by the team)

1. TM 2011 - Formalise the mandates (roles)
2. TM 2011 - Nominate the directors and other officers who are not already in place
3. Early 2012 - Draw up a charter and seek approval from the Steering Committee (e-mail ballot)
4. Before IPAC12 - Appoint a president
5. Before IPAC12 - Present the new structure to lab directors and the community in general
6. ~IPAC12 - Commence operating under the new scheme and organise the first stake-holders meeting
7. Late 2012 - Prepare a long term plan for the future of JACoW for discussion at the 2012 Team Meeting

There are many minor administrative details which remain to be sorted out, such as:

- Should all mandates start initially at the same time or should some provision be made so that not all of the officers will come to the end of their term at the same time? Perhaps a core group of directors could be appointed in 2011 and another 2 added in 2012 and maybe another 2 in 2013.

- How should this be set out formally - just new terms of reference on the website? Probably a formal charter would be sufficient.

## CONCLUSIONS

In my opinion the JACoW Collaboration has not been performing as well as it could over the last few years and some change is needed if its long term success is to be assured. I have proposed a more formal managerial structure for the team with a view to clarification of responsibilities and internal accountability. I hope that these ideas can be broadly accepted by the team and that JACoW can move forward and be a stronger and more efficient collaboration.

In the discussions at the Team Meeting, care should be taken to keep in mind JACoW's stated aims, priorities and the associated risks. The decisions taken should help JACoW to fulfill its currently stated mission and to mitigate the risks.

The TEAM should reach a consensus on the changes at the Team Meeting in Shanghai and immediately appoint the new officers (and obtain their commitment to meeting their mandate) even if the board of directors are only considered as advisors until the new structure is approved. In this way the work of the collaboration can be guaranteed before the formal changes are accepted.

The proposed changes do not require that JACoW becomes a legal entity. This has been discussed a number of times previously and has always been discounted due to the additional costs that it would imply (formal accounting and financial management) and I do not see a need to move in this direction yet.

JACoW has run very well for 15 years on the goodwill of the collaboration members and I believe that it can continue to do so in the long term.