

arXiv@25 Review Strategy

Last Update: November, 2016

From users' perspective, arXiv continues to be a successful, prominent subject repository system serving the needs of many scientists around the world. However, under the hood, the service is facing significant pressures. The conclusion of the Scientific Advisory Board (SAB) and the Member Advisory Board (MAB) 2015 annual meetings was that, in addition to the current business model with a focus on maintenance, the arXiv team needs to embark on a significant fundraising effort, pursuing grants and collaborations. We need to first create a compelling and coherent vision to be able to persuasively articulate our fund raising goals beyond the current sustainability plan that aims to support the baseline operation. We'd like to use the approaching 25th anniversary of arXiv as an important milestone to engage us in a series of vision-setting exercises.

arXiv@25: Strategy and Timeline for Vision Setting and Fund Raising

November-December 2015

- Identify a number of areas to be considered for a vision setting process and create a survey instrument - **COMPLETED**
- Conduct a SAB/MAB survey to poll their opinions on future directions and priorities ([Vision Setting Survey](#)) - **COMPLETED**
- Start the user survey planning process - **COMPLETED**
- Hire a part-time person (or assign this role to an existing staff) to work with us in coordinating the planning activities - **COMPLETED**

January-February 2016

- Analyze and report findings of the vision setting exercise - **COMPLETED**
- Start the 2016 annual fund raising campaign with the goal of increasing annual contributions (arXiv MAB subgroup will come up with recommendations to increase annual membership revenue through a platinum membership model) - **COMPLETED**
- Plan and test a user survey based on the initial findings of the vision-setting exercise, taking into consideration different segments: users as readers, users as submitter, users as moderators - **COMPLETED**
- Receive recommendations from the MAB IT subgroup about the goals and desired outcomes of a workshop with repository experts to consider arXiv's current infrastructure and workflows & put in place a plan for hosting a workshop (Planning Meeting I) - **COMPLETED**

March-May 2016

- Conduct the user survey - **COMPLETED**
- Host IT external experts/consultants to advise us on future directions (Planning Meeting I) - **COMPLETED** [Additional Information](#)
- Start analyzing and reporting the findings from the vision setting process, user study, and the IT workshop - **COMPLETED**

June 2016-July 2016

- Prepare a report summarizing the key findings of the user survey - **COMPLETED** [arXiv User Survey Report](#)
- Based on the findings of the vision setting process, user study, and the IT workshop, start identifying priorities and funding sources to support next-gen arXiv development efforts
- Repeat the online fund raising campaign (Give button) to generate additional funds - - **COMPLETED**
- Design a survey targeting arXiv's moderators (new addition to the strategy, June 10, 2016) - - **COMPLETED**

August-September 2016

- Submit a grant funding proposal in support of Phase I next-gen arXiv development efforts - **COMPLETED**
- Design and implement a survey targeting arXiv's moderators - analyze results - - **COMPLETED**
- Continue to identify funding sources, make initial contacts
- Plan and hold SAB/MAB annual meeting to review findings and nascent work plans & develop strategies for moving us forward - **COMPLETED**

October-December 2016

- Next-gen arXiv Phase I: Create & implement work plans & make staffing arrangements - **IN PROCESS**