

**Journal of Insurance Medicine
Report to AAIM Executive Council
May 9, 2004**

This report is submitted to the Executive Council for review and discussion:

1. Publication Schedule:

Currently on or close to schedule for planned 4 issues in 2004 volume (36). Issue 2 is currently in production.

| | Issue 1 | Issue 2 | Issue 3 | Issue 4 |
|---------------------------------|------------------|--------------|---------|----------|
| Manuscript deadline (to Editor) | 12/15/03 | 2/15/04 | 5/15/04 | 8/15/04 |
| Ad closing date | 2/18/04 | 4/15/04 | 7/15/04 | 10/15/04 |
| Mail date | 3/30/04 (actual) | 5/28-6/15/04 | 9/15/04 | 12/15/04 |

2. Peer Review Process

Reviewed in detail during October 2003 meeting. Overall, the review process is proceeding well, subsequent to processing of article backlog and clear statement of the process's goals (constructive commentary intended to improve article quality for the reader). I plan to perform more detailed review of results over one year for October meeting.

3. Copyright

This copyright assignment statement has appeared in the instruction pages of JIM for years: "Upon acceptance, written transfer of copyright to the American Academy of Insurance Medicine (AAIM) signed by all authors will be required." After extensive and somewhat frustrating investigation, there is no evidence that JIM ever developed a form or required the assignment of copyright from authors to AAIM to occur.

This policy is widely practiced by most clinical medicine journals. Its purpose is to centralize management of permissions and oversee re-uses of the content assembled by the sponsoring organization or publisher. Of course, it is also a way to collect additional fees.

This lead me to consult a copyright attorney to develop an assignment form, assist in determining what this means for JIM now, and what implementation of this policy would do for AAIM/JIM in the future.

What does this mean to JIM now?

Allen Press has registered the copyright for each issue on our behalf with no interruptions. With registration, *JIM* is protected by copyright law as a "collective work". That is, AAIM's rights extend to the "whole" issue, including the cover, introductions, front matter, arrangement of articles. AAIM has exclusive rights to reproduce an issue as a whole unit. However, the initial owner of the copyright for an article is the person who wrote it. Therefore, for AAIM to have rights to the articles individually, an assignment of the copyrights from the authors would be needed in order for AAIM to have rights to the articles themselves. There have been a growing number of requests to reprint parts or whole *JIM* articles -- either in print or electronic media (web sites). Our procedure for requests received by *JIM*/AAIM has been to have the requester seek permission from both the author and *JIM* for the requested re-use. However, from the current legal review, only the author's consent is needed for re-use. The author is free to "reproduce and otherwise exploit the article in any way she or he sees fit." This raises some concern about the use of JIM content for marketing or the appearance of *JIM* articles in places that may not necessarily be in AAIM's best interest.

What would implementing the copyright assignment policy do for JIM in the future?

The "up side" is obviously a remedy of the problems noted above. It would establish AAIM/JIM as the central point for receiving and granting clearance for re-use or republication. It may be fee generating, but

this would not be my interest currently. It would allow the oversight of re-use of JIM material along the lines of its mission-education and advancement of the science of risk assessment.

There are at least these practical issues in implementation of an assignment policy:

1. It would require an additional administrative task for the Editor (or someone I designate) to distribute, collect, and record receipt of the copyright assignment statements.
2. An additional "hurdle" is placed in the author's path to submit papers for publication to JIM.
3. When an article is done on "company time" or with company resources, this may be considered "work for hire." The author's employer may consider that it owns the copyright. An additional burden may be placed on the author to determine this, inform us, and seek additional sign-off.
4. If JIM implements the assignment policy and two out of an issue's planned 10 articles are not assigned to JIM, does JIM refuse to publish? A large clinical journal can probably afford to do this, but it would be a serious limitation were we to do this.

This summary was distributed to the *JIM* associate editors and Board members as part of a Board "e-meeting". To summarize their feedback, there was a general sense that assignment of copyright would be beneficial to AAIM and the Journal, however, the practical issues, particularly work-for-hire, may be problematic administratively, and from the perspective of being an additional hassle that could discourage authorship. For now, I have maintained the status quo, but I would like the Executive Council to consider this in view of the interests of AAIM.

4. Advertising.
 - a. Advertising policy and advertising rate schedule have been reviewed and updated. There are no significant changes from the existing published policy. The existing, but unpublished rates in place before 2003 were not changed. I reviewed ad production costs and ad charges by other publications Allen Press publishes. Rate tables were formalized for release to current and potential advertisers.
 - b. Unconventional Planning will play key roles in the administration of advertising production, billing, and fee collection. Communication with existing advertisers has been completed so that appropriate fees will be collected going forward. No ad revenue was collected for the 2002 or 2003 volumes.
 - c. Allen Press is producing an informational "card", so that we can answer inquiries, and conduct a mailing to potential advertisers (e.g. insurance industry service providers) in the near future.
 - d. Long-term goal is to generate ad revenue sufficient to offset production costs.
5. Future of the Journal
 - a. This remains the number one concern. I have left the door open to the widest range of articles applicable to insurance medicine, and I actively solicit articles from AAIM members and affiliated insurance professionals. I have also sought articles from professionals outside of the industry whose expertise or research would likely be of interest to a significant subset of our readership. My intent is to maintain a clear presence of mortality and life insurance related articles in every issue, but it is an increasing challenge to do this due to the retirement of key contributors, and a reduction in AAIM's membership. I have received, and will continue to need referrals and "leads" to potential authors by associate editors, board members, and the membership of AAIM to sustain the submission manuscripts of reasonable quality and relevance.
 - b. New "features" that are intended to repeat with every issue, or on a sporadic basis are:
 - i. ECG case studies
 - ii. "Back to the Basics" tutorials on core knowledge and underwriting principles.
 - iii. "Classics" – reprinting core knowledge insurance medicine articles from past issues
 - iv. Articles generated from annual session presentations

These have provided new sources for somewhat predictable manuscript "flow" which can be used to build our issues around. But, we must identify and generate new sources of papers from within our membership to sustain the Journal's mission.

- c. With manuscripts in-hand and promised, we are in a reasonable position through the 2004 volume. Delivery on “promises” is a key factor, which has occurred in high percentage of instance to date. This must be sustained. There are still some “openings” for the last issue of 2004, and planning has begun for the first issue of 2005. We no longer have the luxury of an “inventory”, but I don’t think a delay in publication of more than 6 months is fair to authors, or to readers.
- 6. Organization.
 - a. No changes since prior meeting.
- 7. Financial
 - a. Lara Burita, editorial assistant remains contracted through 2004 with maximum per issue of \$2700 (45 hours @\$60)
 - b. Allen Press. Cost per issue varies somewhat by content (36:1 was large) graphic content, and need for revisions (which is decreasing as our learning curve progresses and QA at AP increases). Overall costs have been stable averaging \$5000-\$6000 per issue. Decreased subscriber numbers will allow reduction in copies produced, but this is a minor factor in overall costs. Current subscription fees continue to cover current production and shipping costs for non-member subscribers on a per copy basis. Will review prior to year-end.
 - c. Permissions fees. Has not been a significant issue over past 6 months.
 - d. Transcription of selected presentations during Annual Session. Total was \$465 for 6 lectures. I would like AAIM to tape presentations to enable transcription of selected presentations at 2004 annual session as well. I have been in contact with Dr. Titcomb regarding this.
 - e. I plan to attend CSE (Council of Science Editors) seminar for new editors and annual session in Vancouver. Estimated \$1500 in October 2003. Estimate approx. \$2500 now based on meeting registration fees and current airfare.
 - f. Expected income based on ads placed to date: \$6000.
- 8. Considerations for the future
 - a. Allen Press alternatives.
 - i. Overall our process and relationship have improved, but issues remain. Time and resources that would have to be devoted to a change, and potential benefits that may be lost from our continuing association with Allen Press must be taken into consideration in a decision to change to a another vendor.
 - b. JIM on-line.
 - i. Supplemental content such as tables and appendices.
 - 1. “Experiment” with MMLC BP article tables.
 - ii. Full content, electronic subscriptions? The Journal’s web page had been improved, and links to current issue contents and abstracts have been facilitated by Keith Clark to take advantage of an existing, but non-utilized service provided by Allen Press. Since 1/10/04 there have been 850 “page hits” to the JIM web page.
 - c. Consideration of a reader survey with mailing of a future issue.

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