Evolving Open Access Models
Management & Evaluation Strategies
Your Presenters Today

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Open Access (OA) Definitions

**Transformative Agreement**
Also known as a transitional agreement, moving a subscription to OA publishing

**Subscribe to Open (S20)**
Supporting OA transitions through subscription funding

**Publish & Read**
The publisher receives payment for publishing and reading is included for no additional cost

**Read & Publish**
The publisher receives payment for both reading and publishing in a single contract
Quick Poll

1. Does your institution or consortium currently invest in or support OA initiatives?
2. Would your institution or consortium like to do more investing in or supporting OA initiatives?
3. Has your institution or consortium tried to support OA initiatives and decided to scale back?
Key Points Today

• Our Institution
• UC California Digital Library (CDL) & Our Consortial Environment
• OA Models: Pros and Cons
• Evaluation Process
• Key Licensing Terms to Consider
Fast Facts about UCSD

• Founded in 1960, in 2023 had **42,300 students** (and growing)

• UCSD is one of 10 campuses that comprise the University of California system across the state.

• In FY2023, had $1.76B in sponsored research funding.

• #7 in the world for “most highly cited researchers”

• 7,657 articles published in 2023 (WoS)
One of our Core Pillars:

1. **Democratize Knowledge**

   “The Library is an advocate and a voice for making the knowledge of the university openly available in support of communities that value research and learning.”

**Strategy 1:** Center “open” in our collection development and management work
Membership in the California Digital Library (CDL)

CDL has negotiated transformative OA agreements with most large academic publishers.

When we refer to “local” agreements, we are talking about publishers not covered by CDL.
Should we Agree to a Local OA Agreement?

**Pros**
- Benefit to Authors (publish)
- Benefit to the larger community (read)
- Publishers are Moving to OA

**Cons**
- Potential to cost more than traditional models
- Unsustainability at scale
- Complexity
- Not all publication types are easy to make OA
Evaluation of Open Access Offers
1. Does this align with our Library’s needs and goals?
   - Does this resource make sense for us to even consider?

2. What is the overall new funding expenditure required by the Library?
   - Can we afford this? Do we want to?
3. **What are we getting?**
   - Understand the model.

4. **Who/what is covered in the agreement?**
   - Looking for equity, the limitations of the deal, and what authors can expect.

5. **What is the duration of the agreement?**
6. **How does signing the agreement compare to not signing?**
   - What are our actual options here?

7. **How is all of this supposed to get administered?**
   - What is the workload like? The author experience?

8. **How are the author’s rights protected in the agreement?**
   - Retention of author’s copyright is important.
OK. We’re gonna do it! Now what?
Important Considerations

• Track your OA spending, track your OA savings
• Funding
• Request a license as appropriate
  • Important licensing terms to consider
  • Negotiate
• Get the Word Out!
• Assessment
  • Publisher supplied tools
  • Internally developed tools
Guiding Documents


Guiding Documents


UC San Diego. (n.d.) *UC San Diego - Publisher Open Access Agreement Decision Tool*. Retrieved May 2, 2024 from https://docs.google.com/document/d/1bt6dhbS4tJSEDy73GtzHb9up12vvpUtuNSiwEfCuDF8/edit
Thank You!

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