

Lessons learned - implementation

Three views of open access

	1. Researchers and Readers	2. Funding institutions	3. Implementers
Relevant categories	Green, gold, bronze, hybrid, diamond, etc.	Read and Publish, Subscribe to Open, Pure OA, etc.	Variations in verifications, reporting, invoicing, and access.
Relevant questions	How will this be available? Where can I read it?	How much does it cost? What do we get for it?	

Questions for implementing open access agreements

- **Eligibility verification:**
 - What publications are eligible? (journal titles, article types)
 - Which roles are eligible? (author roles and institutional roles)
 - Is there a limit on our publishing during the term?
 - Deposit account? Article vouchers?
- **Invoicing:** how, and how often, are we invoiced?
- **Reporting:** how, and how often, do we receive reports on publishing?
- **Access:** Is there a “read” component?
 - If so, what are its terms? (ILL, post-cancellation access, etc.)

Questions for implementing open access agreements

<u>Publishing limit</u>	<u>Approvals method</u>	<u>Approvals frequency</u>	<u>Reporting method</u>	<u>Reporting frequency</u>	<u>Invoice method</u>	<u>Invoice frequency</u>
None	None	n/a	E-mail	Annual (by April 1)	GWLA	Annual
Up to 4 published authors?	Oable /OAS	Per article	Oable /OAS	Per article	Direct	Once per agreement
40 articles for 2021, 43 for 2022	RightsLink	Per article	RightsLink	Monthly	Direct	Annual
APC cost basis	Oable	Per article	Oable	Per article	Oable	Monthly
21 articles	RightsLink (from mid-2020)	Per article	RightsLink (from mid-2020)	Monthly	Direct	Annual
APC cost basis	E-mail	n/a	E-mail	Quarterly	Direct	Quarterly
APC cost basis	E-mail	Monthly	E-mail	Monthly	Direct	Monthly
None	None	n/a	E-mail by request	Annual	Direct	Annual
None	None	n/a	Oable /OAS	Per article	EBSCO	Annual
None	n/a	n/a	n/a	n/a	LYRASIS	Annual
69 articles (50 hybrid, 19, full OA)	Proprietary dashboard	Per article	Proprietary dashboard	Monthly	Direct	Annual
None	None	n/a	Proprietary dashboard	Monthly	Direct	Annual
None	n/a	n/a	n/a	n/a	Direct	Annual
None	None	n/a	Oable	Monthly	Direct	Annual
APC cost basis	Proprietary dashboard	Per article	Proprietary dashboard	Monthly	Direct	Annual

Questions, continued

- Eligible Creative Commons licenses?
- Author copyright retention?
- Deposit of version of record to institutional repository?
- Roll over of unused funds?

Towards standardization & consolidation

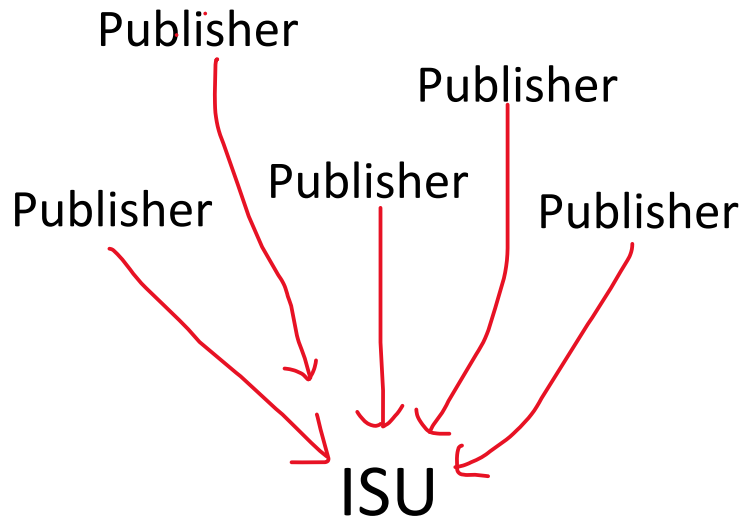
oa switchboard

- Shared community infrastructure
- Central data exchange hub
- Between research funders, institutions and publishers
- Early stages of launch phase

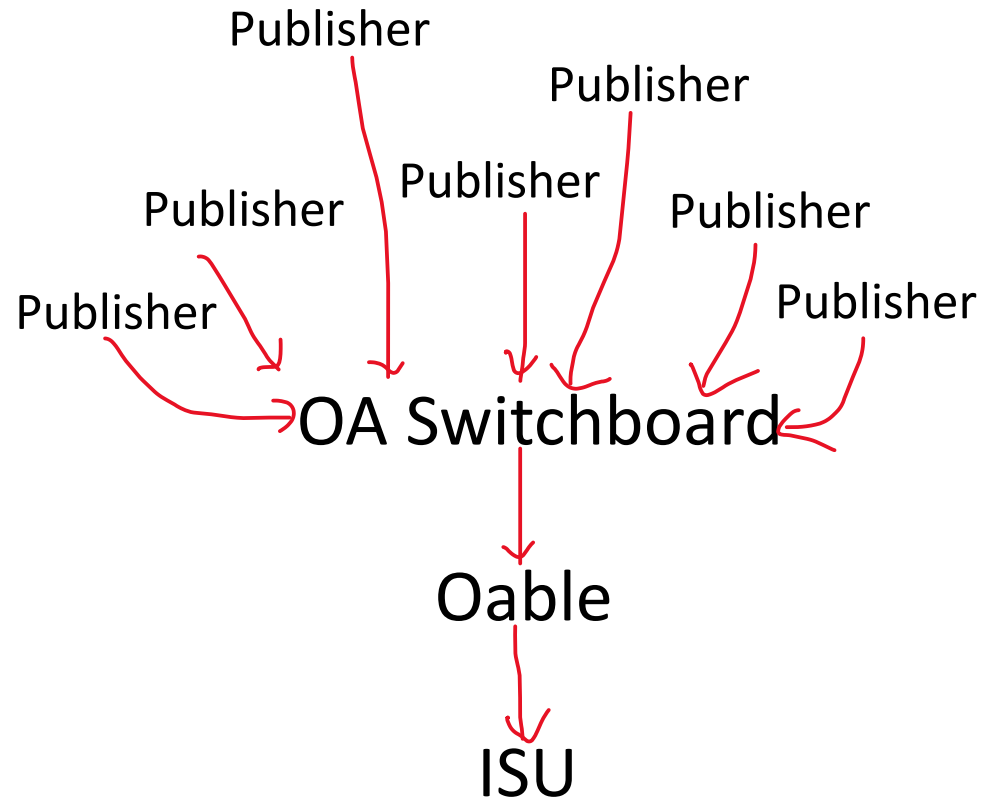


- Product/service from Knowledge Unlatched
- Dashboard for verifications and reporting
- Streamlined payments
- (cf. traditional subscription agents)

NOW



FUTURE?



A photograph of a wooden gate in a field. The gate is made of weathered wood and is partially open. The background shows a green field and a blue sky. The image is overlaid with a semi-transparent blue rectangle containing text.

Thank you!

Curtis Brundy

AUL for Scholarly Communications and Collections

cbrundy@iastate.edu

Twitter: [@curtisbrundy](https://twitter.com/curtisbrundy)

Matthew Goddard

Electronic Resources Librarian

mgoddard@iastate.edu