Assessing Open Access: Exploring Methods, Tools, and Challenges

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Defining Open

Open scholarship: that which enables the broadest possible distribution and use of scholarly work by reducing and removing barriers to sharing, accessing, and distributing scholarly information.

Today: focusing on open access journals, databases
State of Open

Nationally

● OSTP Memo
● COVID-19 pandemic
● Higher education affordability

For Libraries

● Popularity of transformative agreements
● Shift toward open for major publishers and university presses
● Disinvestment in large subscription packages
● Positional expertise within institution
OA Resources in Libraries

Opportunities

● OA resources increasingly prevalent
● Increase access to scholarly content
● Support library ethics and values!

Challenges

● Mistrust of OA resources
● Deciding which resources to add to collection
● Cataloging and discovery
● Resource maintenance
● Faculty and researcher buy-in
● Assessment
Resource and Collection Assessment

- Act as responsible stewards of library collection to ensure researchers have access to most relevant content
- Respond to and manage library collections budget
- Maintain catalog
- Promote targeted resources
- Negotiate with library publishers and vendors
- Though there is no outright cost to providing access to OA resources, investment requires staff time!
Challenges to Assessing Open

- Lack of standardized reporting system and data
- No vendor statistics available
- Limited assessment at the title-level
- Time-consuming and confusing
Assessing OA Coverage

Questions answered: What percentage of our subscription resources are currently open? What type of open access do our vendors/publishers support? How much are our researchers paying in APCs for publishing OA Gold?

Tools

- Publisher websites (free) – # list of OA and transformative journals, future plans for open, APC costs
- Dimensions (free and paid subscription) – % of OA content for specific journals and databases
- Unsub (paid subscription (low cost)) – forecast OA coverage in event of discontinued subscription coverage
Assessing OA Authorship

- Questions answered: Are our researchers publishing open access? Where are they publishing open access?

- Tools
  - Institutional Repository – green OA authorship activity
  - Dimensions (free and paid subscription) - authorship information for specific researchers
  - Unsub (paid subscription (low cost)) – authorship information through weight by title in identified package
  - Web of Science (paid subscription) – authorship information at both the institution and researcher level
  - Individual publishers – number of articles published per year
Assessing OA Usage

Questions answered: How much OA content are our researchers using in our subscribed packages? Are our users accessing OA content through our catalog? How are our users getting to OA content?

Tools:
- Institutional repository – number of downloads and possible location of downloads
- COUNTER 5 reports (free for subscribed resources) – usage by access type (TR_J3) by year and month by publisher for subscribed resources
- Link resolver usage – how many ‘clicks’ the link resolver has for a specific resource in catalog or Google Scholar
- Proxy services/ LibKey (paid subscription) – how many users are accessing databases or collections and from where
Considerations

● Subscription tools to evaluate OA can be pricey, and some may not work depending on library policies
● Limited staff capacity and knowledge – where should we focus our time?
● How will assessing open scholarship inform our collections decisions at our library?
Questions/Contact

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