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Mining for Gold: Identifying the Librarian's Toolkit for Managing Hybrid OA

Jill Emery
Portland State University, jemery@pdx.edu

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Mission of Librarians

- Mission of Librarians is to Improve Society through Facilitating Knowledge Creation in their Communities


- [http://www.newlibrarianship.org/wordpress/](http://www.newlibrarianship.org/wordpress/)

 Angela Raspin, Librarian responsible for Manuscripts and Special Collections with Ben Pimlott when editing the Dalton Diary By LSE Library (London School of Economics Library)
A Future To Consider

“Breaking the barriers of time and space: the dawning of the great age of librarians”

T. Scott Plutchak


doi: 10.3163/1536-5050.100.1.004
Three Objectives of This Presentation

- OA = money
- OA = management
- OA = enterprise endeavor
Figure 4.1 Share of world articles for UK and comparators, 2006-2010.

Source: International Comparative Performance of the UK Research Base – 2011
Prepared by Elsevier for BIS
Graph

Inflation-adjusted Cost of FY98 Library Materials vs Actual Base Budget FY98 – FY12

- Library Materials Base Budget
- FY98 Budget adjusted for academic publishing inflation
Background of Survey

- **Survey Team**
  Sarah Beasley, Robin Champieux, Jill Emery, Kasia Stasik

- **Choice of Publishers**

- **Questions Asked**

Still Picture Records Section, Special Media Archives Services Division (NWCS-S), National Archives at College Park, 8601 Adelphi Road, College Park, MD, 20740-6001.
## OA Hybrid Overview

<table>
<thead>
<tr>
<th>Publishers</th>
<th>Name of your hybrid OA program</th>
<th>Year began</th>
<th># of journals participating (at time of survey)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cambridge UP</td>
<td>Cambridge Open</td>
<td>2007</td>
<td>120 out of 297 total</td>
</tr>
<tr>
<td>Elsevier</td>
<td>Elsevier Open Access</td>
<td>2006</td>
<td>1,500 out of 2,700</td>
</tr>
<tr>
<td>Nature PG</td>
<td>NPG Open</td>
<td>2007</td>
<td>47 out of 84</td>
</tr>
<tr>
<td>Oxford UP</td>
<td>Oxford Open</td>
<td>2005</td>
<td>110 out of 246</td>
</tr>
<tr>
<td>Sage Publications</td>
<td>Sage Choice</td>
<td>2006</td>
<td>200+ out of 632</td>
</tr>
<tr>
<td>Springer B.V.</td>
<td>Springer Open Choice</td>
<td>2004</td>
<td>1,400+ out of 1,945</td>
</tr>
<tr>
<td>Taylor &amp; Francis Group</td>
<td>T&amp;F Open Select</td>
<td>2006</td>
<td>685 out of 1,600</td>
</tr>
<tr>
<td>Wiley/Blackwell Publishers</td>
<td>OnlineOpen</td>
<td>2004</td>
<td>743 out of 1,500</td>
</tr>
</tbody>
</table>
# OA Hybrid Costs

<table>
<thead>
<tr>
<th>Publishers</th>
<th>OA hybrid costs</th>
<th>Factors</th>
<th>Track source of APC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cambridge UP</td>
<td>STM: $2,700&lt;br&gt;HSS: $1,350</td>
<td>Production</td>
<td>Yes</td>
</tr>
<tr>
<td>Elsevier</td>
<td>$3,000</td>
<td>Production/competitors</td>
<td>No</td>
</tr>
<tr>
<td>Nature PG</td>
<td>$2,620-$5,000</td>
<td>Production/rejection rates/Competitors</td>
<td>No</td>
</tr>
<tr>
<td>Oxford UP</td>
<td>$3,000</td>
<td>Production/Competitors</td>
<td>Yes</td>
</tr>
<tr>
<td>Sage Publications</td>
<td>$3,000</td>
<td>Varies by discipline</td>
<td>No</td>
</tr>
<tr>
<td>Springer B.V.</td>
<td>$3,000</td>
<td>Production</td>
<td>No</td>
</tr>
<tr>
<td>T&amp;F Group</td>
<td>$3,250</td>
<td>Production</td>
<td>Yes</td>
</tr>
<tr>
<td>Wiley/Blackwell P</td>
<td>$3,000</td>
<td>Not Answered</td>
<td>No</td>
</tr>
</tbody>
</table>
# OA Hybrid Discounts Offered

<table>
<thead>
<tr>
<th>Publishers</th>
<th>Discount offered</th>
<th>When</th>
<th>Consortia discount?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cambridge UP</td>
<td>Uptake has not impacted sub cost</td>
<td>Not applicable</td>
<td>Not applicable</td>
</tr>
<tr>
<td>Elsevier</td>
<td>Not explicitly given/OA still too small %</td>
<td>Not applicable</td>
<td>No</td>
</tr>
<tr>
<td>Nature PG</td>
<td>Global discount if over 10% or more of content in previous year OA</td>
<td>Started in 2010</td>
<td>Site license applied</td>
</tr>
<tr>
<td>Oxford UP</td>
<td>2013 is discounted based on 2011 OA publishing/mitigation of inflation</td>
<td>Started in 2009</td>
<td>Same as institutional discount</td>
</tr>
<tr>
<td>Sage</td>
<td>Monitoring uptake</td>
<td>Not yet</td>
<td>Not applicable</td>
</tr>
<tr>
<td>Springer</td>
<td>Significant OA uptake means discount to an institution</td>
<td>Not given explicitly</td>
<td>Each consortia discount is unique</td>
</tr>
<tr>
<td>T&amp;F Group</td>
<td>Calculation related to % of OA in previous yr</td>
<td>Not given explicitly</td>
<td>If negotiated for</td>
</tr>
<tr>
<td>Wiley/Blackwell</td>
<td>No</td>
<td>Not applicable</td>
<td>Not applicable</td>
</tr>
<tr>
<td>Publishers</td>
<td># of articles (at time of survey)</td>
<td>Growth rate</td>
<td>Exclusion?</td>
</tr>
<tr>
<td>------------------------</td>
<td>----------------------------------</td>
<td>---------------</td>
<td>-------------------------------------</td>
</tr>
<tr>
<td>Cambridge UP</td>
<td>363 since 2007</td>
<td>1%</td>
<td>Society Preference</td>
</tr>
<tr>
<td>Elsevier</td>
<td>2,750 since 2007</td>
<td>~8%</td>
<td>Society Preference</td>
</tr>
<tr>
<td>Nature PG</td>
<td>822 since 2007</td>
<td>10%</td>
<td>Partner Organizations Choice</td>
</tr>
<tr>
<td>Oxford UP</td>
<td>4,340 since 2007</td>
<td>10% in life sci 3% in medicine 1.5% in HSS 2.5% in Math</td>
<td>Law Case Reports Demand lacking Society Preference</td>
</tr>
<tr>
<td>Sage Publications</td>
<td>116 since 2007</td>
<td>10%</td>
<td>Society Preference</td>
</tr>
<tr>
<td>Springer B.V.</td>
<td>5,912 since 2009</td>
<td>1.1%</td>
<td>Society Preference</td>
</tr>
<tr>
<td>T&amp;F Group</td>
<td>312 since 2007</td>
<td>6%</td>
<td>Society Preference</td>
</tr>
<tr>
<td>Wiley/Blackwell</td>
<td>1,864 since 2009</td>
<td>1.2%</td>
<td>Society Preference</td>
</tr>
</tbody>
</table>
Hybrid OA Marketing & Licensing

- Journal website
- Article acceptance
- Article submission
- Variations of CC-BY-SA-NC or CC-BY-SA-NN

Eason’s Book Stall at Waterford Train Station
By National Library of Ireland on The Commons
Publisher Tracking of Hybrid

- OA tracking @ point of order for primary author
- Some tracking on APC funding
- Track uptake by journal & funding body but not institution
- Metatags used on articles
- Track usage

Tracks leading into the freight house at Proviso yard. This is said to be the largest covered freight house in the world. C&NWRR, Chicago, Ill. By the Library of Congress
Libraries Obtaining Lists

- Not easy
- No cross-over between fulfillment system & article processing system
- Download statistics via COUNTER 4 compliant usage reports

Political Goods Price List, Cornell University
Collection of Political Americana, Cornell University Library
Librarian Advantages

- Librarians & the scholarly publishing ecosystem
- We have experience with article level processing
- We have institutional view of program development & needs
Librarian Strategy #1

- Talk about hybrid OA
- Identify stakeholders in the library
- Identify stakeholders at your institution
- Build essential partnerships

By Woodrow Wilson Presidential Library Archives
Librarian Strategy #2

- Develop funding for content creation
- Re-evaluate research resource demand
- Maintain funding for unanticipated collection purchases/needs
Librarian Strategy #3

- Become familiar with the standards
  Promote the use of standards to the stakeholders

- Promote use of standards with hybrid OA publishers

- Watch NISO for the development of a standard for Open Access Metadata and Indicators

Image taken from Wikimedia Commons
20/2/2013 listed in public domain.
Problems with Tracking OA

- Citation tools
- Subscription agents are not there yet
- Stakeholders may have useful information
Librarian Strategy #4

- Develop your way to pull together funding management & publication tracking
- Assume you will miss something
- Explore OAK & CCC options more fully
What to Avoid with Hybrid OA

- Separate teams
- Separate processing stream
- Ceding management to another institutional department

Detail of an Engineer and Engine at a Rail Cross Road in New Ulm, Minnesota. By the U.S. National Archives
From Gold to Green

- Can lead to other options
- Make recommendations
- Offer local publishing options
- Offer maker spaces
Conclusion

- Make the investment to support OA publishing at your library
- Develop the management structures needed
- Engage everyone in OA provision
Thank You

- Jill Emery
- Collections Librarian
- Portland State University
- E:jemery@pdx.edu
- @jillemery
- Ntkl.tumblr.com