

## 2018-19 Project Charter

<b>PROJECT NAME:</b>	Choosing Pathways to Open Access Forum
<b>PROJECT MANAGER:</b>	Rachael Samberg, Scholarly Communication Officer
<b>TEAM MEMBERS:</b>	Maria Gould, Scholarly Communication & Copyright Librarian
<b>PROJECT SPONSOR:</b>	Jo Anne Newyear Ramirez

### PURPOSE & GOALS

*Describe the current challenges and opportunities that the project addresses. What core issue will be addressed by the project? What goals will be achieved by the project? What benefits will the project deliver and which constituencies will receive these benefits?*

Many within the scholarly community have been trying to achieve a large-scale transition to open access (“OA”) to scholarly literature for nearly twenty years. To date, only around [15% of peer-reviewed journal articles are published in fully open-access journals](#). At this rate, realizing a full OA scholarly universe could take decades. The Library’s strategic plan envisions progressing toward openly accessible readership for all, which means making critical choices about how we spend our money in supporting OA publishing. To advance data-driven decision-making on these issues, in February 2018, the University of California (UC) libraries and the California Digital Library released the [Pathways to Open Access](#) toolkit. The *Pathways* toolkit analyzes the many approaches and strategies for advancing the large-scale transition to OA, and identifies possible next action steps for UC system-wide investment and experimentation.

The UC libraries also designed the *Pathways* toolkit to be a practical resource for other institutions wrestling with the same choices. Our Library’s Office of Scholarly Communication Services (OSCS) proposed the next step in helping other institutions make critical choices about redirecting their funds: A UC systemwide forum based on the *Pathways* toolkit to enable participants to create localized reinvestment plans suitable for their own institutions or communities. The Council of University Librarians approved, and appointed OSCS as the Planning Committee chairs.

OSCS led a team of 12 committee representatives from UC campus libraries and California Digital Library. The forum, [Choosing Pathways to Open Access](#), was held October 16-17, 2018 and invited North American library or consortium leaders and key academic stakeholders gathered to substantively deliberate and develop plans for how they will repurpose budgets and subscription spends to support a transition to open access publishing. Participants had a meaningful opportunity to:

1. Understand actionable mechanisms and opportunities for advancing the transition to OA
2. Engage in facilitated, substantive exchange on the pragmatics of each of these strategies
3. Accelerate their own action initiatives based upon the discussions

The forum has already resulted in commitments to ambitious action and next steps by participants. Just a few include: (1) Formation of a working group to invest collections budgets in open source infrastructure to reduce open access publishing barriers; (2) Working toward “big deal” (subscription journal) cancellations; (3) Setting aside five percent of the library’s budget to support open access publishing (including open access book publishing by the university press, so-called offsetting deals in which open access publishing charges are counted toward the library’s overall subscription payment, and investment in open infrastructure); (4) Investment in library-led open access publishing programs; (5) A task force to work with scholarly societies to provide funding or guidance to support a “flip” from subscriptions to open

access publishing; (6) Leveraging metadata within campus research information management (or “profiling”) systems to identify faculty journal editors with whom to collaborate.

**ALIGNMENTS WITH STRATEGIC GOALS**

*Describe how the project align with the strategic priorities of the Library.*

The Choosing Pathways to Open Access Forum worked to achieve all four Library strategic goals. We helped:

- *improve how scholars access resources*, by enabling deliberations leading North American libraries’ action to redirect funds away from subscriptions and toward open access;
- *help develop emerging areas of scholarship*, by working to create a universe in which scholarly materials are accessible to all, and can be used and expanded upon with less restrictive licensing;
- *grow as an adaptive learning organization*, by setting a high standard for how the Library can conceive of and execute upon innovative, high-impact, and high recognition events; and
- *tell our story to build community and cultivate relationships*, by establishing connections within the research community and demonstrating to a very broad and relevant audience what we can accomplish together through collective action.

**2018-19 PROJECT SCOPE**

*(Describe the scope of the project during 2018-19. The scope defines the boundaries where the project begins and ends. The scope describes what will be delivered including where, when, and how. It describes the services, functions, systems, solutions, or tangible products to be created during the course of the project, as well as the business process impacts.)*

Phase 1 of this project (holding the forum) is complete. Phase 2 involves a new charge from the Council of University Librarians (CoUL) to follow up with participants and make recommendations for further systemwide action. This will culminate in both internal and public reporting in approximately March 2019. Additionally, the Phase 2 committee (again lead by the Office of Scholarly Communication Services) will be speaking at conferences and other venues about this work.

**2018-19 PROJECT DELIVERABLES**

*(List what will be when it will be delivered, and describe what success look like for the project.)*

<b>Deliverables</b>	<b>Date</b>	<b>Measure of success</b>
Conduct participant surveys and follow-up calls	Jan - Feb 2019	60% response rate
Develop report	Feb - Mar 2019	Submission of report to CoUL and blog post with version of report for public dissemination
Presentations	Mar-Nov 2019	One internal and one external presentation

