

University of Massachusetts Amherst

From the Selected Works of Marilyn S. Billings

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Technical Services in the Age of Open

Marilyn S Billings



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Technical Services in the Age of Open

Presentation by Marilyn S Billings
Scholarly Communication Librarian

New England Technical Services Conference, April 02, 2018

Today's Outline

- Introduction and Context
- Scholarly Communication: New Roles
- Open Access Journals
- Lessons Learned / Challenges
- Progress
- Future Efforts

Scholarly Communication: Alternative Models

- **Institutional Repositories**

- Unified open access to and preservation of the electronic collections of works of members of the institution's community

- **Open Access Journals**

- Available at no cost to end user, without financial or legal barriers
- Remove most license barriers
- Subsidized by institutions, societies, author fees (APCs)

- **Open Educational Resources**

- Freely accessible, openly licensed documents and media that are useful for teaching, learning, and assessing as well as for research purposes

- **Open Data / Open Research**

- Central theme is to make clear accounts of the methodology freely available via the internet, along with any data or results extracted or derived from them

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Exploration of Alternative Models: Opportunities

- Creation of new types of content and formats
- Wide dissemination of scholarship
- Visibility and citation impact factor at journal and article levels
- Use, re-use, and re-purposing of scholarly materials, all at no cost to end user
- Digitally archive work with permanent url or DOI
- Rights management of content
 - Use of addendum for publisher journals
 - Use of Creative Commons licenses
- Maintain faculty roles as authors, peer reviewers, editors

Exploration of Alternative Models: Challenges

- Perception issues
 - Quality and impact of OA journals
- Copyright issues
 - Author rights
 - Licenses / Ownership
 - Publisher contracts
- Editorial issues
- Marketing
- Publication and distribution

Scholarly Communication: Library Roles

- Nexus of communication for campus
- Library role as steward of scholarship
- Collect, preserve, and disseminate digital material
- Organize, provide access to information
- Expanded liaison role with faculty
- Copyright, fair use, author rights, Creative Commons
- Information and digital fluency
- Research data management services

Scholarly Communication Department

Scholarly Communication


What is "Scholarly Communication"? Scholarly Communication is a term used to describe the ways that academics, researchers, scholars, and teachers share information, through publications and teaching. We offer numerous services relating to **open access**, including information programming and consultations.

Services

Some examples of the services we provide

- **Copyright & Publishing Contracts** - We offer support for issues surrounding author's rights, fair use of included materials, and licensing and assignment of your research and publications.
- **Open Access** - We can answer your questions about Open Access and the university's **Open Access Policy**. We also maintain the **Supporting Open Access and Research (SOAR) Fund** to support Open Access scholarship on campus.
- **Open Educational Resources (OERs) & Teaching Materials** - We support the development of OERs, by providing **grants** for development of OERs, as well as coordinating the development of resources with subject / liaison librarians.
- **Publishing Services** - We publish a variety of conferences, journals, workshops, and monographs through ScholarWorks as well.
- **Theses and Dissertations** - The Libraries are embarking on an ambitious, multi-year project to digitize all of the University of Massachusetts Amherst's dissertations and theses. Visit **ScholarWorks** to see current and past theses and dissertations. See the **Digitization Notice Board** for a list of works currently being digitized.
- **ScholarWorks** - ScholarWorks provides access to and preserves your research and scholarship. We host articles and papers, datasets, teaching materials, presentations, and other work created by members of the UMass Amherst community. Faculty and campus researchers and authors are invited to create individual ScholarWorks pages to highlight their own work. Campus departments and units can also create their own pages to highlight the work of their unit or affiliates.

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Open Access Policy

University of Massachusetts Amherst Policy for Open Access to Faculty Publications

Policy endorsed by the Faculty Senate on April 7, 2016 and became effective July 1, 2016

The Faculty of the University of Massachusetts Amherst (hereafter “the University”) is committed to disseminating the fruits of its research and scholarship as widely as possible. In keeping with that commitment, the Faculty adopts the following policy: Each Faculty member grants to the University permission to make available his or her scholarly articles and to exercise the copyright in those articles. More specifically, each Faculty member grants to the University a nonexclusive, irrevocable, worldwide license to exercise any and all rights under copyright relating to each of his or her scholarly articles, in any medium, provided that the articles are not sold for a profit, and to authorize others to do the same. The policy applies to all scholarly articles authored or co-authored while the person is a member of the Faculty except for any articles completed before the adoption of this policy and any articles for which the Faculty member entered into an incompatible licensing or assignment agreement before the adoption of this policy. The University will waive application of the license for a particular article, or delay access for a specified period of time, upon express direction by a Faculty member. Each Faculty member will provide an electronic copy of the author’s final version (or better version, if possible) of each article no later than the date of its publication at no charge to the appropriate representative of the University in an appropriate format (such as PDF) specified by the University. The University may make the article available to the public in an open access repository. The Office of the Provost will be responsible for interpreting this policy, resolving disputes concerning its interpretation and application, and recommending changes to the Faculty from time to time. In implementing this policy the University will strive for simplicity and minimal burden on the Faculty, using appropriate technology to ease the participation of the Faculty. The policy will be reviewed by the Provost (or designee) after three years and a report presented to the Faculty Senate.

Details about the Policy

- [Frequently asked questions](#) about the policy
- [Request an opt-out waiver](#)
- Let us [notify your publisher](#) regarding our Open Access Policy or see a list of [publishers](#) already notified
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Supporting Open Access Research Fund

SOAR Fund

The UMass SOAR ("Supporting Open Access Research") Fund supports open access publication of University of Massachusetts Amherst peer-reviewed scholarship. A pilot program of \$25,000 is available to support researchers on a first-come, first-serve basis. To apply for funds, contact **Erin Jerome** at ewjerome@library.umass.edu.

The SOAR Fund is compatible with the [Compact for Open-Access Publishing Equity \(COAPE\)](#).

- [Application](#) (This is an online application; if you have problems working with it, please contact Erin Jerome at ewjerome@library.umass.edu)
- [SOAR Fund Guidelines](#)
- [Frequently Asked Questions](#)
- [Annual Report and List of Supported Research](#)
- [Open Access Fund Proposal](#) (approved, Senior Management Group, April 18, 2014)
- [Press Release](#) (Oct. 16, 2014)

Publishing and Editorial Services

- Library supported software and staffing
- OA journal creation and management
- Material submission, ingest, call for submissions
- Metadata application
- Peer review and editorial management support
- Data management
- Assignment of ISSN, DOIs
- Dissemination of content
- Preservation, durability, storage

Best Practices for OA Journal publishing

- Committee on Publication Ethics (COPE)
 - Research and publication misconduct advice for editors and publishers
- Directory of Open Access Journals (DOAJ)
 - Develop, maintain, and curate information on OA journals
 - Advocate compliance with standards of digital publishing
- Open Access Scholarly Publishers Association (OASPA)
 - Trade association for OA publishers, to help drive high standards in open access publishing
- World Association of Medical Editors (WAME)
 - Develop policies and best practices for medical editors

COPE, DOAJ, OASPA, WAME Open Access Journal Criteria

- 1. Peer review process
- 2. Governing Body such as editorial board
- 3. Editorial team / contact information
- 4. Author fees
- 5. Copyright and licensing information
- 6. Process for identification of and dealing with allegations of research misconduct
- 7. Ownership and management information
- 8. Web site - ensure high ethical and professional standards

OA Journal Criteria continued

- 9. Name of journal
- 10. Conflicts of interest
- 11. Access
- 12. Revenue sources: author fees, subscriptions, advertising, reprints, institutional support, and organizational support
- 13. Advertising policy
- 14. Publishing schedule
- 15. Archiving: backup and preservation of access to the journal content
- 16. Direct marketing

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communication +1 provides an open forum for exploring and sharing ideas about communication across modes of inquiry and perspectives. Its primary objective is to push the theoretical frontiers of communication as an autonomous and distinct field of research. Suspending any judgment regarding distinction between theory and practice, this forum encourages critical reflections on communication and seeks to encourage these reflections to and among those who place communication at the center of their thinking and writing.

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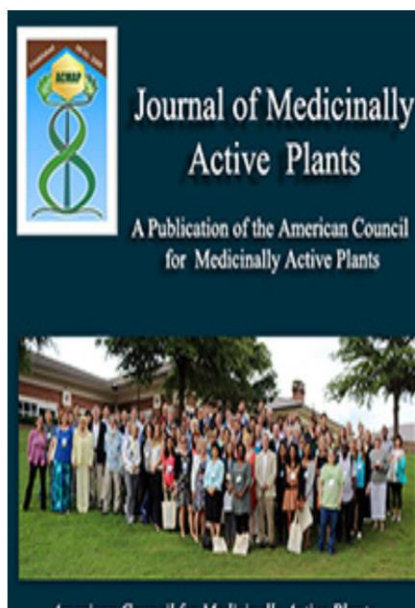
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Transforming Library Roles

- Demonstrate value across the institution
 - Use formal assessment
 - Engage in online learning
- Collaborate with teaching and research faculty
- Become more student-centered, patron experience
- Embrace role as educators
- Maximize impact on student learning and success
- Provide education and workshops

Issues of Diversity in Publication

- Angela Cochran, Sara McNamara, Ann Michael, Mady Tissenbaum, Alice Meadows, Lauren Kane, “Mind the Gap: Addressing the Need for More Women Leaders in Scholarly Publishing,” panel at the Society of Scholarly Publishing Annual Meeting (2015).
- Charlotte Roh, Emily Drabinski, Harrison Inefuku, “Scholarly Communication as a Tool for Social Justice and Diversity,” panel at the Association of College and Research Libraries Annual Meeting (2015).
- Charlotte Roh, “Library publishing and diversity values”, *CR&L News*, vol. 77 no. 2, 82-85, Feb 2016.

What's next? What's the goal?

- Focus on quality and high impact in scholarly publishing
- Expand library publishing service components, best practices, and partnerships
- Transform academic culture so that libraries become principal publishers of scholarly work
- Move toward open licensing for library-created content
 - Anita Walz (librarian at VA Tech)
- Sign on to the OA2020 initiative
 - Goal: to convert journals from subscription to OA by re-directing subscription funds to OA funds and to finance essential services

Open infrastructure and services

- Creative Commons

OA 2020 and implications

- Global initiative toward open scholarly communication system
- Accelerate transition to universal Open Access
- Transform scholarly journals to open access
- New services and publishing initiatives

Open Licensing for Library-Created Content

- Aligns with library mission and ALA Statement of Ethics +++_+
- Library-created content and resources
 - Examples:
 - Websites
 - Topic and Subject Guides
 - Learning objects: tutorials, presentations
 - Reports
- Metadata
 - Open Data Commons Attribution (several universities, DPLA)
 - Principles on Open Bibliographic Data

Open Licensing for Library-Created Content

- Special Collections and University Archives

Examples:

- Archival finding aids, consider CC0 licensing
- Pilots of open licensing for scans, OpenGlam

Inside Out Collection Development

Thanks!

Questions?

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Copyright Services

- Education
 - Consultations and appointments
 - Informational materials
 - Special events
 - Workshops
- Topics
 - Author / publisher agreements
 - Fair use
 - Open licensing options
 - Public domain content
 - Reclaiming copyrights of older materials