Diversifying Investment in Open in the United States

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Not the best fit: APC-Based Transitional Agreements

• Inequitable funding models
  • Funding burden falls on a small subset
    • 4,000 academic institutions in the US
    • ~250 Research Institutions (131 - Research 1)

• Decentralized Funding
• Silos of action
• Lack of diversity in:
  • Publishers, Authors, Content, Readers/Learners, Society
US Participation in Open Overview

DRAFTING PRINCIPLES AND VALUES TO GUIDE INVESTMENT DECISIONS

BUILDING COMMUNITY

UNBUNDLING/DISINVESTING => REINVESTING IN OPEN
Principles & Values Statements

- MIT Libraries Framework for Publisher Contracts
- Iowa State University Libraries Principles & Strategies to Support Openness
- KU Leuven Fair Open Access
- NERL Demands a Better Deal
- GWLA Licensing Principles
- BTAA The Big Collection

Tools for Operationalizing Values

- NGLP Values and Principles Framework and Assessment Checklist
- SPARC-COAR Good Practice Principles
- University of California Scholarly Transformation Advice and Review (STAR) Team Criteria Summary
- LYRASIS Open Access Community Investment Program
A Multi-Pronged Approach

We respect the diversity of Open models. We need many approaches to support the diversity of scholarship.

We focus on programs that create opportunities for diverse libraries and institutions to engage.

We seek transformation through a variety of models.

LYRASIS Open Access Programs:
https://www.lyrasis.org/content/Pages/Open-Access-Programs.aspx

Open Books

Knowledge Unlatched Book Collections
LYRASIS UN Sustainable Development Goals OA Books Fund
Opening the Future
- Central European University Press
- Liverpool University Press
punctum books Supporting Library Membership Program
SCOAP3 Open Physics Books Fund
University of Michigan Press Fund to Mission

Open Journals

Annual Reviews Subscribe to Open
Demography
Open Library of Humanities
SCOAP3 – American Physical Society
Knowledge Unlatched Journal Collections
Open Access Community Investment Program (OA Diamond)

Open Research Infrastructure Services

LYRASIS DataCite US Community (Digital Object Identifiers)
IRUS – US (Institutional Repository Usage Statistics)
ORCID US Consortium (Researcher IDs)
Directory of Open Access Books (DOAB) | OAPEN Library Membership
The money system is a game of musical chairs, a mad scramble in which some are necessarily left out. It is an outgrowth of our attitude of scarcity. But we can’t just change our attitudes about money; we must change money too, which after all is the embodiment of our attitudes. - Charles Eisenstein
Act! Put your money where your mission is

- Establish principles and values as well as mechanisms and tools for operationalizing them
- Invest in your mission FIRST
  - Consider creating a budget line specifically for investing in new OA programs
  - Diversify and **balance** your investments
  - Look for opportunities to invest in publishers that align with your mission
    - Keywords: Academic-led, Scholar-led, Diamond OA, Collective/Collaborative Funding, Membership, Subscribe to Open, Native/Pure OA