



# Assessing Open Access: Exploring Methods, Tools, and Challenges

Taylor Ralph (she/her)  
Collection Assessment Librarian  
Oregon State University  
[taylor.ralph@oregonstate.edu](mailto:taylor.ralph@oregonstate.edu)





# 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

[taylor.ralph@oregonstate.edu](mailto:taylor.ralph@oregonstate.edu)