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CNI 2024 Fall Membership Meeting, Washington, D.C.

Improving Open Access Discovery for Academic Library Users: A Conversation with Library Leaders

Welcome



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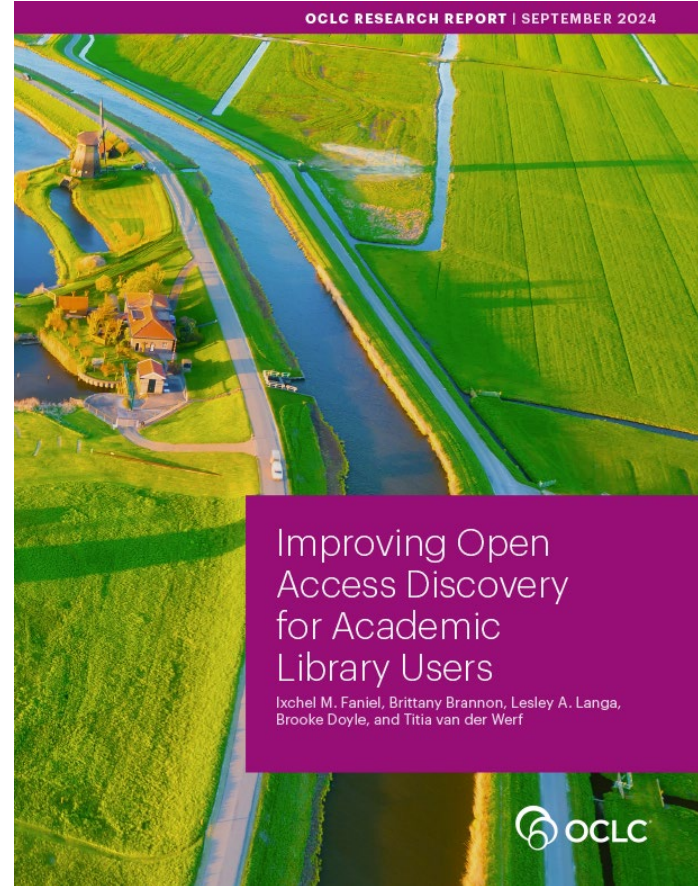


**Lisa Janicke
Hinchliffe**
University Library
at the University of
Illinois at Urbana-
Champaign

Research objective

Investigated how academic libraries can improve the discoverability of scholarly, peer-reviewed open access (OA) publications for their user communities.

Report available [oc.lc/oa-discovery](https://oclc.org/oa-discovery)



Seven academic libraries

- 4 universities, 3 universities of applied sciences (UASs)
- Library efforts to improve discoverability of OA publications
 - Library survey (n=7)
 - 2-hour group interviews with 4-6 people at each institution (n=37)
- User experiences with scholarly, peer-reviewed publications and open access
 - User survey (n=461)

Our Conversation

- Selecting and adding OA publications to library collections
- Creating and exposing metadata
- User behaviors and experiences
- Q&A

Selecting and adding OA publications to library collections

Evaluating OA publications

“Because I think a lot of content that is published open access by others than the traditional publishers, it's as meaningful as the traditional publisher, but we don't know how to value them or how to make sure that it's good information.”

- Open access information specialist, UAS2

Managing OA publications

“If you have multiple sources, then we will get a lot of duplication....We can add records together to some extent, but this is mainly because the metadata is not [consistent] between the different platforms, so if they would be more alike, then it would be easier to simply add all duplicates within one record.”

- Repositories and CRIS manager, U1



Open Access Resource Management in Academic Research Libraries

Molly Beisler and Laurel Baker
University of Nevada, Reno Libraries



University Libraries
University of Nevada, Reno

OA access problem report from user looking for a journal article:

The screenshot shows a library interface for a text resource. On the left is a vertical navigation menu with the following items: TOP, TOOLS, HOW TO GET IT, GET IT FROM OT..., DETAILS, LINKS, and CITATIONS. The main content area displays the following information:

- TEXT RESOURCE** (with a pin icon in the top right)
- Coronavirus stress, meaningful living, optimism, and depressive symptoms: a study of moderated mediation model**
- OPEN ACCESS** (with an orange padlock icon)
- [Get it for me from other libraries >](#) (with a magnifying glass icon)

Below this information is a section titled "Tools" with a horizontal line. It contains a grid of icons for various actions:

- PERMALINK (chain link icon)
- CITATION (quotation marks icon)
- QR (QR code icon)
- EMAIL (envelope icon)
- PRINT (printer icon)
- SHARE (share icon)
- EXPORT CITATION TO ENDNOTE (EN icon)
- EXPORT CITATION TO BIBTEX (BIBTEX icon)
- EXPORT CITATION TO RIS (RIS icon)
- EXPORT CITATION TO EXCEL (EXCEL icon)

Below the "Tools" section is a section titled "CITATIONS" with a horizontal line. It contains a button with an exclamation mark icon and the text "Report a problem with this item".

At the bottom of the main content area is a section titled "How to get it" with a horizontal line. Below this line is a large yellow rectangular area, which is likely a placeholder for a video or a detailed guide.

Study Design

Research question: How are academic libraries managing the access and discovery of OA content? What challenges do they identify?

- Survey sent to 186 e-resource or discovery librarians in February 2024
- R1 or R2 institutions with libraries that use Alma

Size and Carnegie status of responding institutions (n=38)			
FTE	R1	R2	Total
10,001-20,000	5	5	10
20,001-30,000	3	1	4
30,000+	12	2	14
Less than 10,000	2	8	10
Total	22	16	38

Selecting OA content

- 82% are selective about which OA resources are activated in Alma

Alma activation criteria (n=31) *	Percentage	Count
Publisher is reputable	77%	24
Content in an electronic collection is maintained by Ex Libris	74%	23
Content appears to be updated regularly	58%	18
Content is requested by library employees	55%	17
Content focuses on a specific subject (i.e. medical)	35%	11
Content in an electronic collection can be maintained by the community	35%	11
Decision to activate open access content is made at the consortial level	16%	5
Host platform/website adheres to web accessibility guidelines	13%	4
Other	19%	6

*Multiple selections were allowed

Activation preferences

- 45% (14) of respondents would opt for a smaller amount of OA content if it reduced errors, with only 19% (6) opting for more content even if it increased the error rate.

Activation Preferences	Percentage	Count
Fewer open access resources, fewer errors	45%	14
More open access resources, more errors	19%	6
No opinion	36%	11

Challenges in providing access to OA

- 78% have faced challenges with providing access to OA content

Challenges with providing access (n=31) *	Percentage	Count
Content is not stable	84%	26
Metadata is unreliable	77%	23
Rising costs associated with open access (article processing charges, transformative agreements, subscribe to open, etc.)	60%	18
Difficult for library to identify appropriate and available content	53%	16
Requires too much staff time	30%	9
Other	27%	8

*Multiple selections were allowed

Handling of OA problem reports

- 63% will deactivate an entire collection if issues are frequent

Handling of problem reports (n=38) *	Percentage	Count
Deactivate the particular resource	84%	32
Solve one-off problems yourself	74%	28
Report the problem to Ex Libris	68%	26
Deactivate an entire collection if it seems like there is a pattern of problematic access	63%	24
Contact the publisher/provider of the resource	47%	18
We don't do anything	3%	1
Other (<i>all related to linking failures</i>)	11%	4

*Multiple selections were allowed

Tools for OA access beyond discovery service

- To expose more OA content, 58% of libraries responded that they also integrate external tools such as LibKey, Unpaywall, or Lean Library Open

External tools used in discovery systems (n=22) *	Percentage	Count
LibKey	73%	16
Unpaywall	50%	11
Lean Library Open	5%	1
Other	18%	4

*Multiple selections were allowed

Takeaways & Recommendations for Libraries

- **Proactively work with vendors and publishers** on the need to provide access to OA content with reliable metadata. Consider engagement with user groups or enhancement processes, or adding terms to licenses.
- **Be strategic about which resources are activated** to minimize risk of bad citations or broken links. Consider stability of publisher/platform and whether there is evidence of regular updates.
- **Explore tools that can integrate into discovery services**, to provide alternate links if off-the-shelf linking fails.
- **Communicate with vendors/aggregators about the challenges of mixed OA and paywalled content** (such as hybrid journals).
- **Make it easy to report problems** and get help.

Forthcoming:

“Open Access Resource Management Among Academic Research Libraries in the United States.” *Technical Services Quarterly*, Vol. 42, No. 1.

<http://dx.doi.org/10.1080/07317131.2024.2432092>

Published online Nov. 2024, full publication in early 2025.

Creating and exposing OA metadata

National Dutch aggregators

“Our input they use to develop the templates, the services, the repository. So, the input of the users, the institutions...so we tell them what we need to publish our open access research outputs ideally. So there is a collaboration [that] is working very well. It's very equal.”

- Repositories and CRIS specialist, UAS1

Other stakeholders' systems varied

“So, we already have that open access button in our discovery, but that's only for the repository. So, it's also confusing for our researchers, because it's just a small set of open access.”

- Metadata Specialist, U2

Author deposit and metadata creation

“I mean, if it's about discoverability of the publications, then we need proper metadata, identifiers, information about the open access status.”

- Repositories and CRIS manager, U4



Impact of collaborative work on discoverability

Harriett Green

The University of Arizona Libraries



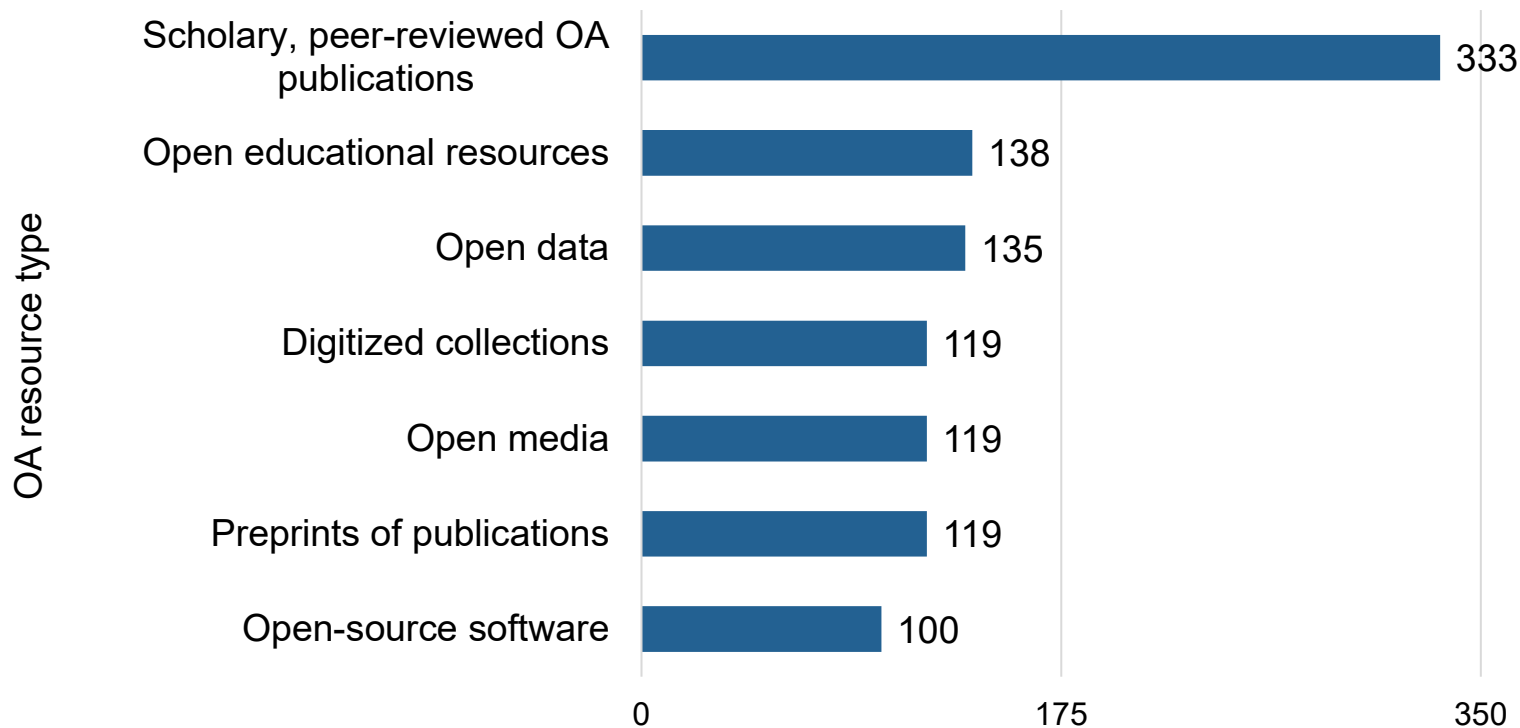
University Libraries

User behaviors and experiences

User experiences with OA

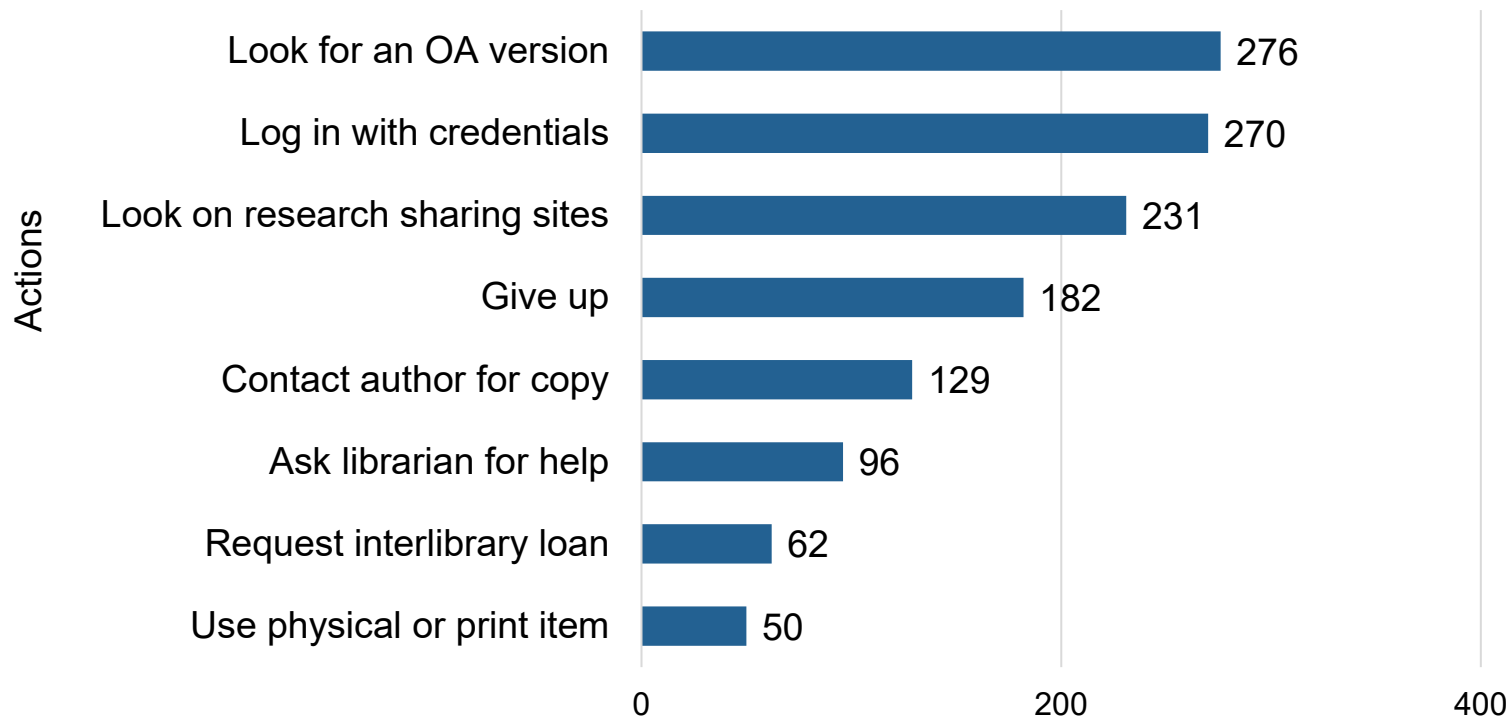
- Most heard of OA, but only half knew a lot about it
- Less than a quarter found OA publications very easy to search for or access
- When searching for scholarly publications “Publication is OA” ranked as 8th most important factor out of 9
- Two-thirds did not use browser extensions to access OA publications

Types of OA Resources Users Searched for



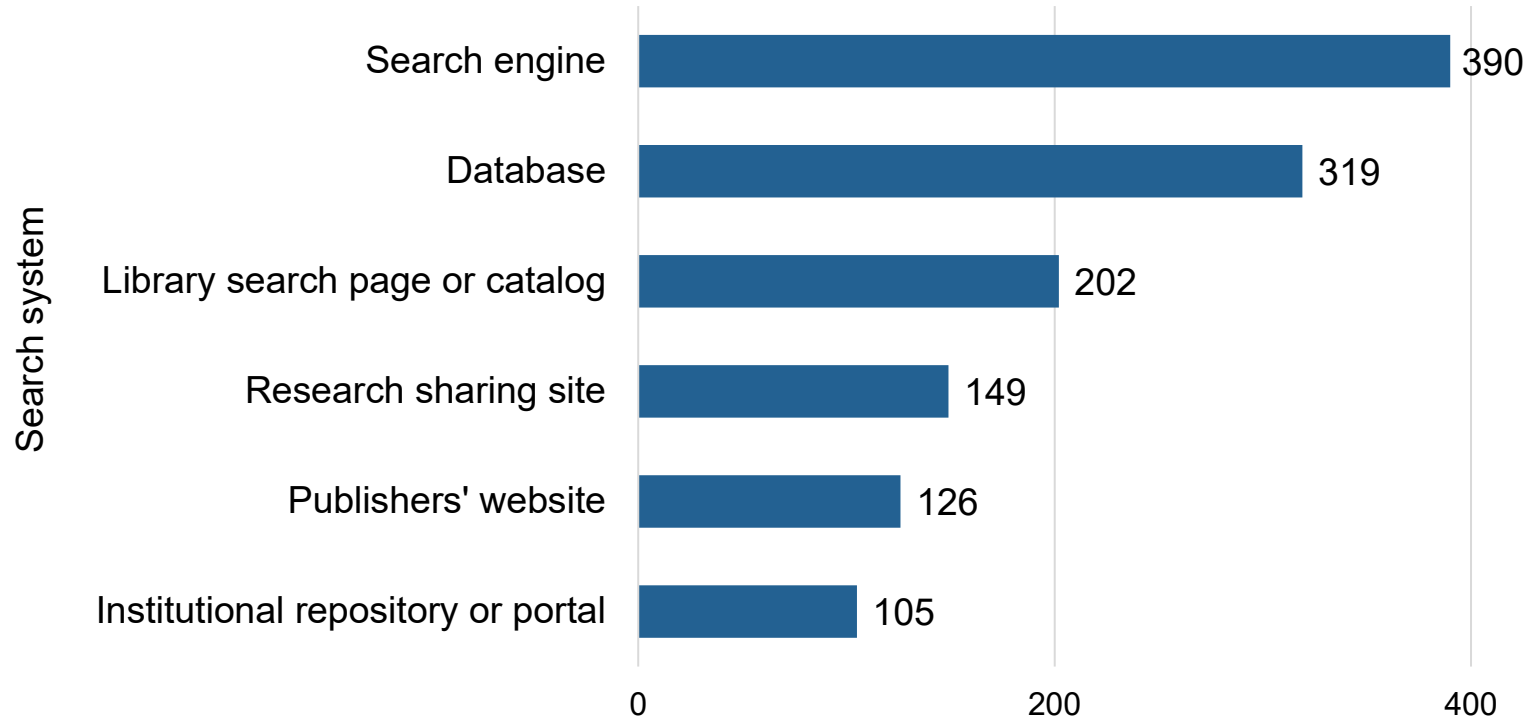
The total number of respondents was 420. Users could select all categories that applied. Categories with fewer 50 responses were not reported in the figure.

Actions Most Likely Taken When Unable to Access Full Text



The total number of respondents was 423. Users could select all categories that applied.
Categories with fewer 50 responses were not reported in the figure

Where Users Normally Search for Scholarly Peer-Review Publications



The total number of respondents was 450. Users could select all categories that applied. Categories with fewer 50 responses were not reported in the figure.



User experiences in context

Lisa Janicke Hinchliffe
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Q&A

Thank you!



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