To: SILS Operations Team, Discovery OST, eResources OST, Resource Management OST, SCP Advisory Committee, campus scholarly communications officers, and other stakeholders
From: SILS Open Access Resource Management Project Team (OARM-PT)
RE: Feedback Requested for Draft OA Definition and Evaluation Criteria

The SILS OARM-PT is seeking feedback on our draft definition of open access and evaluation criteria for selecting an OA resource for inclusion in UC Library Search (UCLS): https://docs.google.com/document/d/1NOx-v_3GTbBhTur4_Wx9R-1OeOG_0OSi6-t7S9EdPjo/edit?usp=sharing

Per the recommendations brought forth by the Open Access Resource Management Task Force in their Phase 2 Report, the SILS OARM-PT has begun a review of the definition of Open Access currently in use by CDL to manage OA resources for UC. We are asking SILS groups and campus stakeholders to review the below definition and criteria that the team has proposed, which are adapted from the CDL Open Access Resources at the UC Libraries - Policies and Procedures for Shared Cataloging, Linking, and Management page.

The following questions may help guide your feedback:
- Does the definition of OA generally align with UC Libraries' understanding/expectations of what might be labeled as OA in UCLS?
- Do the definition and evaluation criteria allow for inclusion of too much content, or are they prohibitive?
- Is there any other feedback you would like to share about this draft document?

The OARM-PT is requesting feedback by **Friday, March 3rd.** Please send feedback to OARM-PT co-chairs Erica Zhang at ezhang20@library.ucla.edu and Carla Arbagey at carlar@ucr.edu, or add comments to this Google Doc. Please feel free to forward this to other interested library staff or librarians.

Thank You,
The OARM-PT:
Carla Arbagey (co-chair), UCR
Erica Zhang (co-chair), UCLA
Jared Campbell, UCD
Rebecca Culbertson, CDL
Nicole Arnold, UCI
Lisa Mackinder, CDL
Yoko Kudo, UCR

Definition

Open access resources have no financial or legal barriers to access for members of our user community. The following factors typically should be in evidence:

1. The resource must be available online at no charge to users. No subscription can be required for online access. It is acceptable for the issuing body to require registration as long as no cost is involved.
2. Users ideally should be able to use the resource for any lawful purpose, such as downloading, copying, making derivative works, distributing, printing, searching, or linking to the full texts of works, crawling for indexing, data mining, or passing as data to software.
3. The resource must not be a free trial, complimentary access with subscription, part of an open access pilot project, only temporary access, or any other arrangement that does not result in long-term zero-cost for the user.

Note that some resources may provide open access to only portions of their content (e.g., just the backfiles, just the front files, rolling embargo content, or only some types of articles). In these cases, additional notes about coverage will indicate what content is available as open access. For example, "Open access to research articles only" will appear in BioMed Central records.

Evaluation Criteria

Making resources available to the UC community entails considerable cost, whether the resources are licensed or open access. Open access resources should be evaluated according to the same quality use indicators that would be applied to licensed content. Examples of factors to consider include:

*   Does the resource satisfy a demonstrable need in ongoing research and/or teaching at UC?
*   Does the resource come from a predatory open access journal and/or publisher?
*   How likely is the resource to persist?
*   Is the URL to the resource stable and reliable (i.e. free of performance or other problems)?
*   Is the interface easy-to-use? Does it adhere to accessibility standards?

- Does the resource require specialized technology (non-standard browser plug-in, special font support, use of a specialized application, etc.)?
- Is the collection or resource a hybrid of open access and paid content? If so, what percentage of the content is open?
- For journals, how close does it fit with the top line definition of the SPARC "How Open Is It?" guide, available at https://sparcopen.org/our-work/howopenisit/?