

Taking over the Open Access Tracking Project and TagTeam

[What I'd like](#)

[Background](#)

[What would this entail?](#)

[If you take over OATP...](#)

[If you take over TT...](#)

[If you take over either project or both...](#)

[How much time would this take?](#)

[How much would this cost?](#)

[My role](#)

What I'd like

- I'd like to turn over the [Open Access Tracking Project](#) (OATP) and [TagTeam](#) (TT) to a nonprofit organization that will take responsibility for their survival, their further development, and their long-term future. The org should be committed to open access and open science (for OATP) and open-source software (for TT). Ideally I'd turn over both projects to the same org.
- If I can't turn over OATP and TT to one org, I could turn them over to a partnership or coalition of orgs. If I can't do that, I could turn them over to an individual. If I can't turn both projects over to the same new owner/manager, I could turn them over to separate ones. But I still want to turn them over.
- My purpose is to assure their future, not to withdraw from them any time soon. Indeed, I want to continue my involvement even after I assure their future. If I can't pass them on before I stop working, then I'll have to lay them down, and I don't want to do that.
- I'd be happy to discuss any aspect of OATP and TT, and what it would mean to take them over. Please [let me know](#) if you have questions or any level of interest.
 - I'd like to hear from you even if you're only interested in taking over one of these projects (OATP or TT).

Background

- I launched OATP in 2009 and have managed it ever since. I launched TT in 2011 and have overseen its development ever since.
- I'm [nearing retirement](#) and that's the only reason I'm looking to pass on these projects to others. I don't want them to die with me. I plan to keep working on both. But I'd like to spend the next phase of my work on them training, advising, and assisting my successors, not driving toward a cliff.
- TT and OATP are separate but closely related.
 - TT is open-source social-tagging software and OATP is a social-tagging project running on TT. Anyone taking over OATP will care about the state of TT. They'll want to enhance TT and probably host their own instance of it.
 - In principle the next OATP owner could migrate it to a different tagging platform. But that would be difficult and expensive. In my view it would also be a mistake, leaving behind unique and powerful TT features developed specifically for OATP, such as "folksonomy in, ontology out". That's one reason why I'd like to turn over both projects to the same org, group, or person.
 - We developed TT to meet the needs of OATP, and future TT development will be closely tied to the needs of OATP. At the same time, TT is now a general-purpose tool for open tagging projects on any topic.
- OATP runs on the Harvard instance of TagTeam. Harvard has been good about hosting it, even when not grant-funded. But in the absence of special funding, Harvard could not probably host it indefinitely.
- Both OATP and TT have been funded in the past, first by Arcadia (2011-2016) and then the Arnold Foundation (2016-2018). Neither project is funded today. But I believe they're both eminently fundable and I'd be happy to help the new owner(s) apply for funding.

What would this entail?

If you take over OATP...

- Learn its full power. I'd be delighted to help.

- Learn the current tag [tag vocabulary](#), even if you modify it.
- Tag new OA-related news and comment yourself.
 - For now, the owner does the bulk of the tagging. But OATP is a crowd-sourced project. As you recruit a larger crowd of active taggers, you can reduce your own tagging (if you wish) without reducing the quality and comprehensiveness of coverage. But until then, expect to do most of the tagging yourself.
- Decide when to approve people who ask to tag for OATP.
 - Decide what TT privileges to give them.
 - Decide when to rescind approval of existing taggers. This has never been necessary, but it would be the only remedy to repeated spam.
- Read the [primary OATP feed](#) every day, and add, remove, or modify tags as needed. This triggers automated feedback from TT to the contributing taggers. It's the best way to monitor and improve the quality of the tagging, and to send feedback to taggers. Without it, the quality of the tag records would decline considerably.
- Give taggers individual (non-automated) feedback, as needed.
 - I did this before we added automated feedback to TagTeam. I still do it on occasion, and would do it more often if I had more time. Some taggers need more feedback than they get from our automated system.
- Recruit new taggers. Seek taggers on every OA subtopic and in every academic field, nation, region, and language.
 - OATP is already the most comprehensive source of OA-related news, but it has gaps and could be even more comprehensive.
 - Monitor which niches are not yet well-covered. Look for good taggers in those niches.
 - As I put it in a [tweet](#), "OATP is like Wikipedia in this respect: It's #crowdsourced & aims to be comprehensive. If it's not as comprehensive as it should be in your field, country, region, or language, or on subtopics of special interest to you, we need more active contributors in those areas."
- Keep taggers informed and motivated.
 - Long ago I reserved the Google group, "OATP". I never activated it but it's still ready to go.
- Oversee the [tag vocabulary](#). Revise as needed.

- I have a Google doc of tag vocabulary decisions worth considering.
- Consult with others (e.g. OA experts, your team, your networks, your taggers) on tag vocabulary decisions.
- Announce new vocabulary decisions on social media and relevant email lists.
- Decide when to create hub-wide filters in TT to convert deprecated tags to approved tags, for example, converting *oa.ebooks* to *oa.books*.
- Decide when to create hub-wide filters in TT to supplement a given tag with another tag, for example, supplementing *oa.mexico* with *oa.latin_america*.
- Decide the [tagging conventions](#). Revise as needed.
- Maintain the [OATP home page and its sub-pages](#).
 - Right now these are on a wiki at the Berkman Klein Center. We'll work out how to make the transfer. It might require launching a new wiki elsewhere and creating redirects from the current wiki.
 - For example, the current OATP home page includes the [FAQ](#) and instructions on [how to get started](#) as a tagger.
- Run the OATP Twitter account ([@oatp](#)).
 - Run the OATP IFTTT account that converts the OATP native RSS feed to a Twitter feed.
- Run the OATP Mastodon account ([@oatp](#)).
 - Run the [MastoFeed](#) account that converts the OATP native RSS feed to a Mastodon feed.
- Run the OATP Mailchimp account that converts the OATP RSS feed to an email feed.
- Note that OATP runs on the Harvard instance of TT. Either negotiate to make that continue (I can help with that) or launch a new instance of TT and migrate OATP to the new instance, taking steps (if possible) to ensure redirects from the Harvard instance.
- Promote OATP among potential readers, not just potential taggers.
 - Promote it among scholars doing [research on OA itself](#).
 - Link to appropriate OATP tag libraries in emails and social-media discussions. Take advantage of this power of OATP to help others, and publicly demonstrate this power for those who were unaware of it.
- Work out a good way to preserve OATP.

- At least preserve the dataset periodically.
- If possible, preserve a functional version in which users can run searches and deep-link to arbitrary feeds, tag libraries, and searches.
- Two excellent students from the UMichigan School of Information have already explored some promising options and I will share the details.
- If you choose to maintain metrics on OATP growth and usage (which may be required by funders, if you get funding), then I can give you my Google docs on its past metrics.
- I strongly recommend a full-time OATP community manager. A community manager would help with every aspect of OATP, especially the tagging, reviewing and improving the tagging done by others, recruiting new taggers, keeping taggers informed and motivated, and promoting OATP to potential taggers and readers.
 - The same community manager could also apply for grants to continue the development of TagTeam, set priorities for new TT features and fixes, and test the TT enhancements (more [below](#)).
 - I can share my list of ideas for what an OATP community manager should do.

If you take over TT...

- Learn its full power. I'd be delighted to help.
- Decide when to approve people requesting new accounts on the Harvard instance of TT, or on your own instance of TT, whichever instance you end up using.
- If you launch your own instance of TT, then write terms of service for it. Feel free to borrow from the [terms for the Harvard instance \(summary\)](#).
- Use our existing [Redmine](#) database of tickets for TT fixes and enhancements.
 - We'll arrange for you to get access to this Harvard-based database or to get a copy of it.
- Set priorities for TagTeam fixes and features.
- Use your own developers to add new enhancements and/or outsource the job.
 - I can recommend the firm that wrote most of the code in the last few versions.
 - If we apply for a grant together (more below), the grant could cover this work for the next few years.

- Run tests on the existing version and on new enhancements.
 - I have a Google doc of tests worth running that we haven't had time to run yet.
- Maintain the [TT home page and its sub-pages](#).
 - Right now these are on a wiki at the Berkman Klein Center. We'll work out how to make the transfer. It might require launching a new wiki elsewhere and creating redirects from the current wiki.
- Promote TT among those who might want to create new hubs, at least if you want new hubs in your instance of TT.
 - The Harvard instance of TagTeam is limited to academic or research projects. But that's because it's hosted by an academic research center without the bandwidth to host projects outside a relatively narrow range. If you host your own instance, you'll decide what kinds of hubs to host.

If you take over either project or both...

- Part of the job will be to do what I'm doing now. If you decide one day that you can't continue to take responsibility for OATP and/or TT, then (1) look for good successors to carry on or (2) find the best way to lay the projects down.

How much time would this take?

- Let me distinguish three related OATP jobs: discovery, tagging, and feedback.
 - *Discovery* is to find new items worth tagging. This is the natural step before actually tagging them (next bullet below). Currently, all OATP taggers do their own discovery and tagging, though I've experimented with ways to divide the labor and would be happy to describe them. What matters here is that we don't have as many active taggers as we want, and the new owner should expect to do most of the OATP discovery and tagging until it can recruit more taggers. I currently spend about 2-3 hours/day on discovery. But note that I consider this part of my ordinary work, which requires me to stay on top of what's happening in the world of OA. So while my discovery time benefits OATP, it's not OATP-specific time. That may not be true for you. On the other hand, *the right org to take over OATP will have its own reasons to stay on top of what's happening in OA and to help others do the same.*
 - *Tagging* is to tag the tagworthy items you have discovered — or, if you divide the labor, the items that others have discovered. If we don't count

the time needed for daily discovery, and learning the tag vocabulary, tagging takes just minutes per day. I currently spend about 15-30 minutes/day tagging. Once you find an item worth tagging, tagging it is a very small additional task. (NB: It's a small task worth doing; the alternative is to find something worth sharing and then *not* share it, even when sharing it is easy.)

- *Feedback* or quality control is to read the daily primary feed (items tagged by you and others) and improve individual tag records as needed. For example, if a tagger omitted one or more relevant tags, then add them. If a tagger used a bad tag, then change or delete it. TT sends taggers automated emails when someone modifies their tags this way. Hence your review/feedback work does two jobs at once: it improves the database and trains the taggers. I spend about 5-20 minutes/day on review and feedback. BTW, all taggers can modify tag records and give each other feedback, just as all Wikipedia contributors can modify other contributions.
- Accept or reject new people who ask for TT accounts. This takes about 5 minutes/month. Related but different: Accept or reject new people who have TT accounts and ask for permission to tag for OATP. This takes about 1 minute/month. For both jobs, I can share some template emails for recurring situations.
- Do some kind of community engagement to recruit, train, and motivate taggers. I don't know how much time this takes, since I've never done it except as a small and unsystematic side effect of corresponding with new and existing taggers. If I had funds, I'd hire at least a half-time community manager, because I think OATP would benefit from at least that much systematic effort. A full-time community manager would be even better, and could do more than I ever could to recruit the crowd for this crowdsourced project. On the one hand, OATP has gotten to where it is without that effort. On the other hand, it doesn't have nearly as many active taggers as it needs and would be far better with more taggers in more niches (academic fields, countries, regions, languages, and OA subtopics).
- Supervise the further development of TT and test new fixes and features. I no longer do this, since I no longer have funding for TT development. But when I did, the time commitment was very uneven: no work for weeks at a time and

then a spike of work to respond to developer questions and test the new enhancements. I've spent a good deal of time writing tickets for the developers and they're sitting in our development tool (Redmine) waiting for attention. I spend very little time these days adding new tickets, partly because most outstanding issues are covered by existing tickets and partly because we have no funds for developers.

- Keep the wiki pages on OATP and TT up to date: This takes just minutes per year. The most common kind of update is to add a new tag to the OATP [list of approved tags](#), which takes just a couple of minutes. But even that job is rare these days.

How much would this cost?

- That depends on how much person-power the new owner puts into managing OATP and developing TT. It also depends on whether the org brings in new people or redefines the roles of existing people.
- I'm looking for an org ready to fund (1) a permanent community manager for OATP, at least half-time, preferably full-time, and (2) continued software development for TT.
- The OATP work could be divided among two or more people. The TT work could be given to existing in-house developers, if any, or outside developers hired for the purpose.
- The full-time equivalent doing the OATP work could apply for grants to pay for the TT work.

My role

- If I can pass these projects on to others before I stop working, then I'll continue to discover and tag for OATP, provide tagging feedback, and suggest enhancements to TT. I'll also train the OATP community manager and tagger-in-chief. I could advise on both projects and be on call to explain any aspect of their history and how they work.
- If you seek new funding for OATP and/or TT, I'd be happy to help. I could seek new funding on my own. But right now I'd prefer to find new owners first and help them seek new funding. If you want to take over OATP and/or TT, I could help you write a grant application and I could participate in the grant-funded work.

Suggested short URL for this doc = bit.ly/TransferOATP