8.10.2024
Amersfoort

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De toekomst is nu

Open Access Discovery project: The findings

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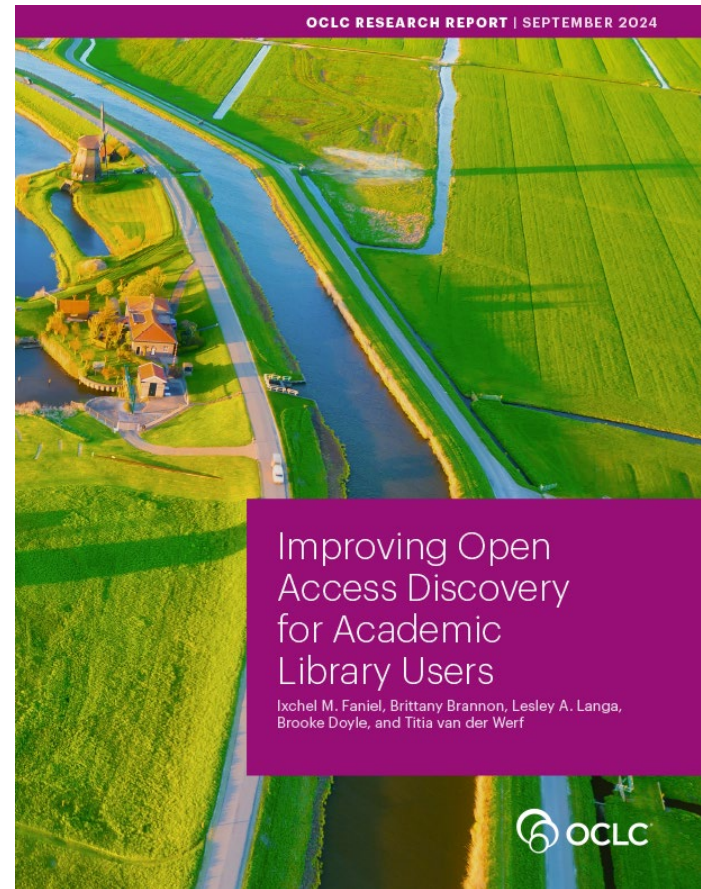**Ixchel M. Faniel**
Senior Research Scientist

#OCLCNL24

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Research objective

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

https://oc.lc/oa-discovery

OCLC RESEARCH REPORT | SEPTEMBER 2024

Improving Open Access Discovery for Academic Library Users

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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)

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Poll Question

Is there a policy that guides your library's open access activities?

A. There is a formal written policy.

B. There is an informal understanding.

C. There is no formal policy or informal understanding.

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Improving discoverability of OA publications

- Selecting and adding OA publications to library collections

- Increasing OA awareness, knowledge, and engagement

- Improving metadata to support OA discovery

- Measuring the effects of library efforts

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Selecting and adding OA publications to library collections

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Hard to evaluate

"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

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Selection criteria: Trustworthy

"You don't want all open access results….You want the ones you have selected as materials, you well trust….That quality label that you want to give, this is something that is important."

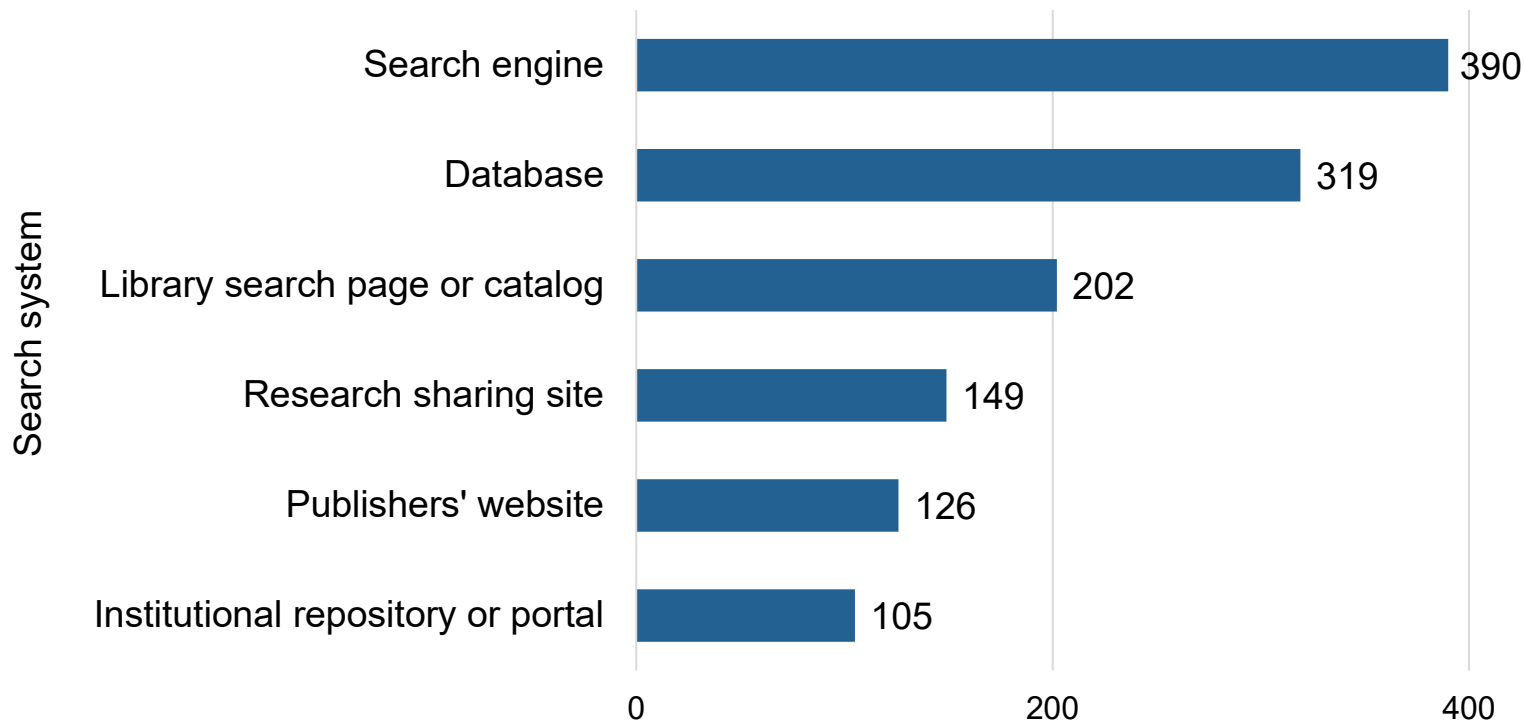- Library systems and tools manager, U4

OCLC

Selection criteria: Dutch-based

"The current discovery tools, they have a central index in which there's mostly international content but not enough Dutch content…so users will get a skewed view of what is available, and the decision was made…to direct the users mainly to…individual databases."

- Library systems and tools specialist, UAS2

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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.

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What this means for library staff:

Incorporating OA publications into library collections, particularly those from national aggregators of Dutch institutional repositories or portals and other OA platforms, is likely to enhance their discoverability because users don't normally go to these sources independently.

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What this means for publishers, technology providers, and aggregators: Ensure that article-level metadata is provided by all publishers, regardless of size. This makes it easier for library staff to add these OA publications to their collections to meet users' needs.

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Important Factors When Searching for Scholarly Publications

Rank 1: Subject is relevant (n=248)

Rank 2: Full text is available (n=104)

Rank 3: I can understand the content (n=77)

Rank 3: It has been peer reviewed (n=73)

~~Rank 4~~

Rank 5: It was recently published (n=73)

Rank 6 & Rank 7: Journal or Publisher's reputation (n=77)

Rank 8: Author's reputation (n=88)

Rank 8: Publication is OA (n=75)

Rank 9: Physical or print item is available (n=283)

The total number of respondents was 429.

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What this means for library staff:

Provide users more guidance about how to evaluate whether a scholarly publication is trustworthy, including reasons why it's important to consider the journal, publisher, and author's reputation in addition to whether the publication has been peer-reviewed.

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Put OA where users are: Browser extensions

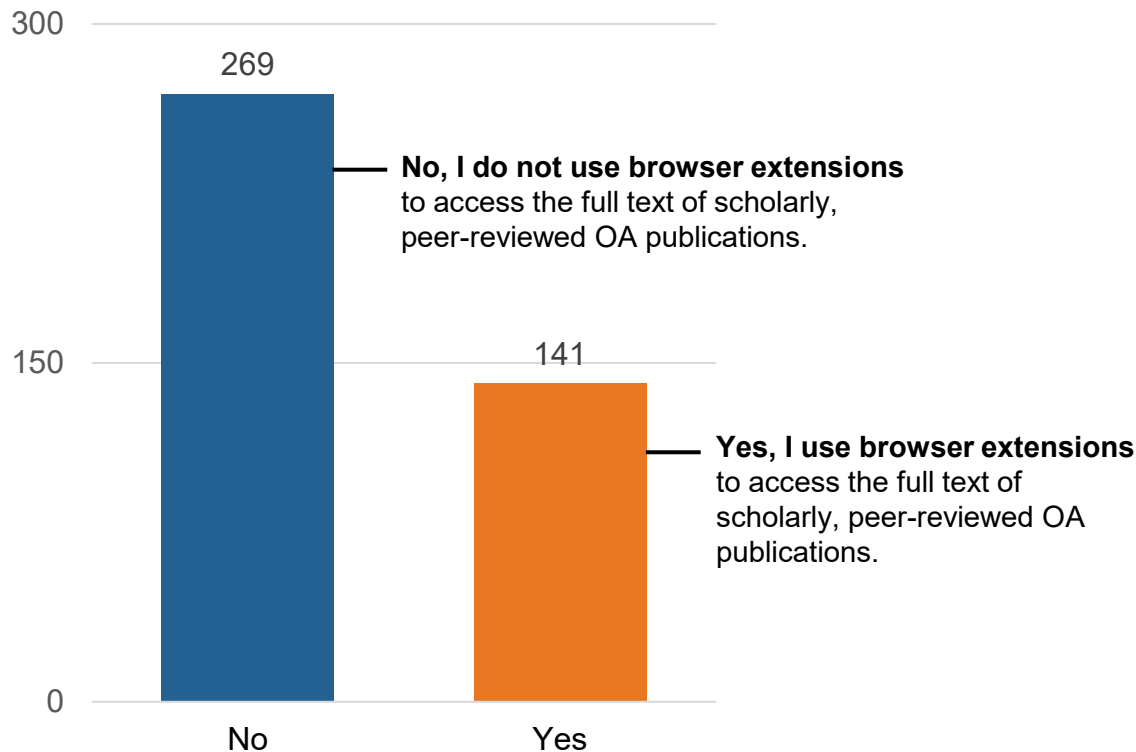"So, basically the OA browser extension knows our subscriptions but then…it also throws that DOI towards all the different repositories that there are around the world….And then if it hits an open access article, it refers directly to the PDF."

- Metadata specialist, U2

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Use of Browser Extensions to Access OA Publications

269

No, I do not use browser extensions to access the full text of scholarly, peer-reviewed OA publications.

141

Yes, I use browser extensions to access the full text of scholarly, peer-reviewed OA publications.

300

150

0

No   Yes

The total number of respondents was 410. Users could select all browser extensions that applied.

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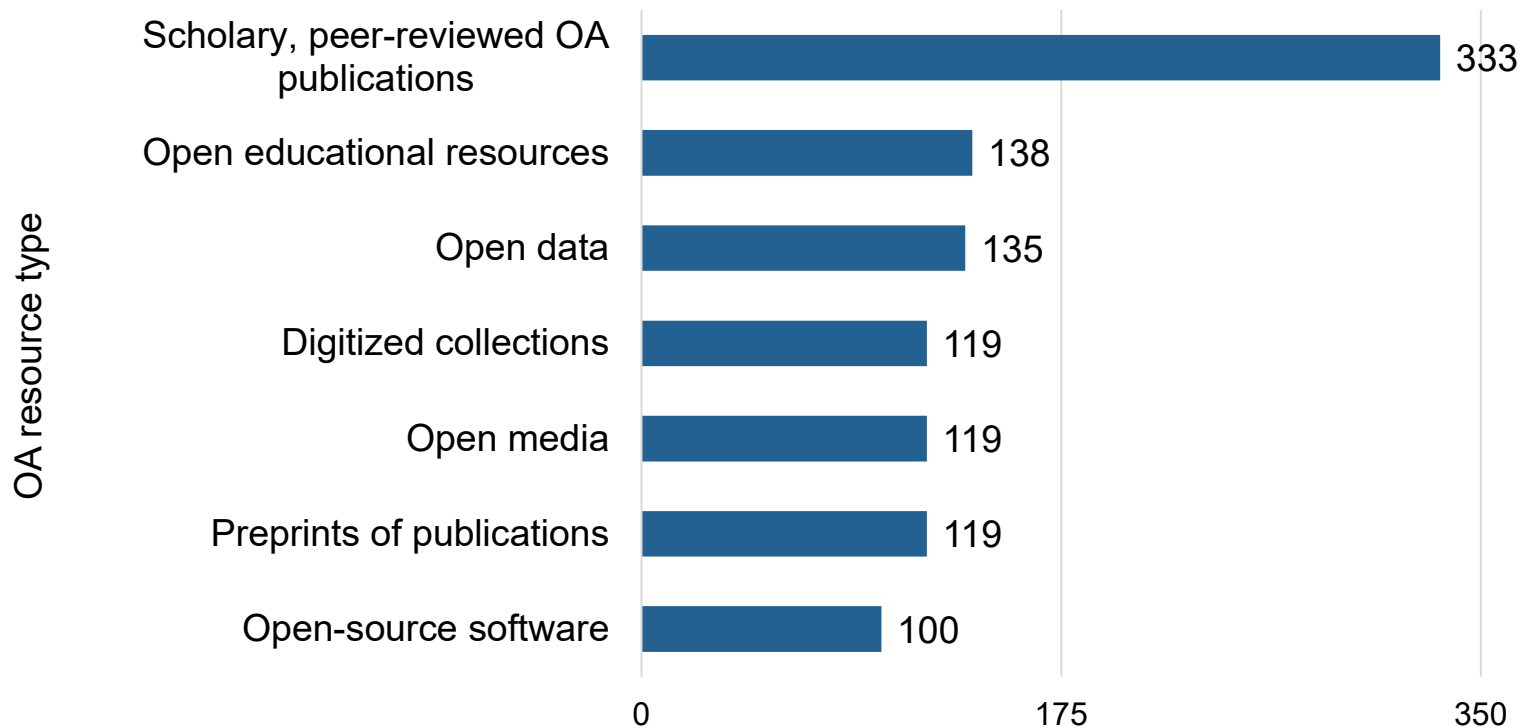# What this means for library staff and technology providers:

Browser extensions, both those that integrate with library collections and those that only search for OA versions, can be valuable options for improving users' discovery experiences. Library staff and technology providers need to promote these tools to help users adopt them into their discovery workflows.

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Increasing OA awareness, knowledge, and engagement
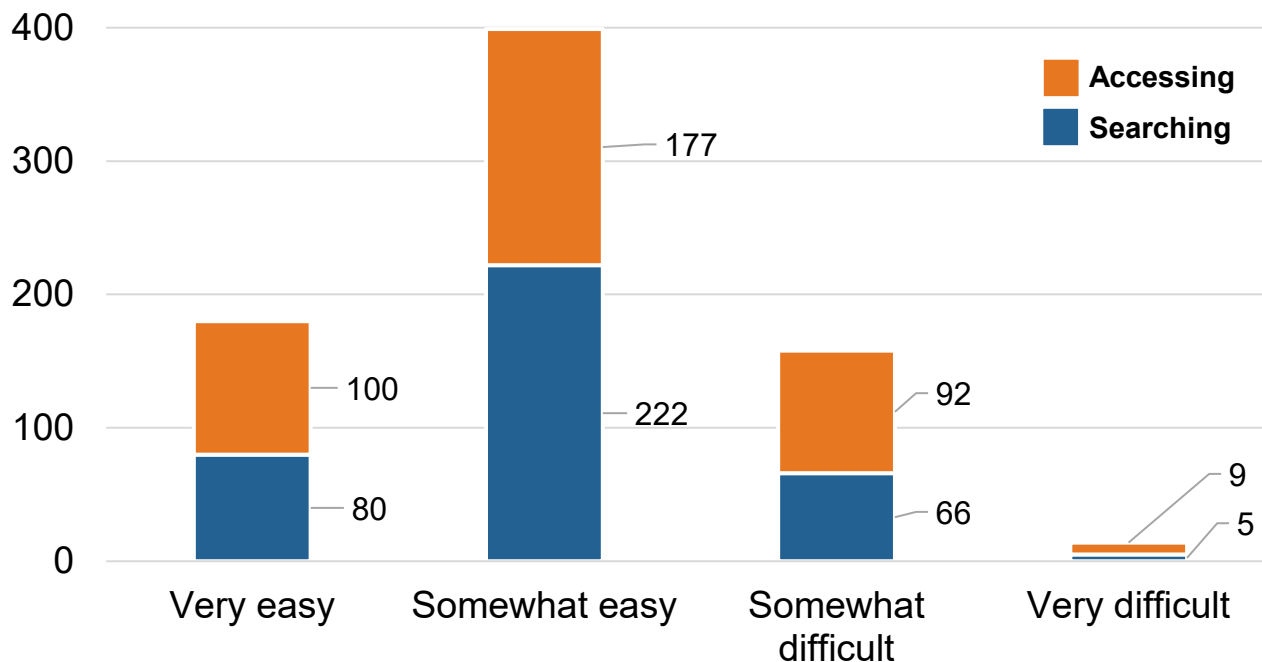
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Types of OA Resources Users Searched for

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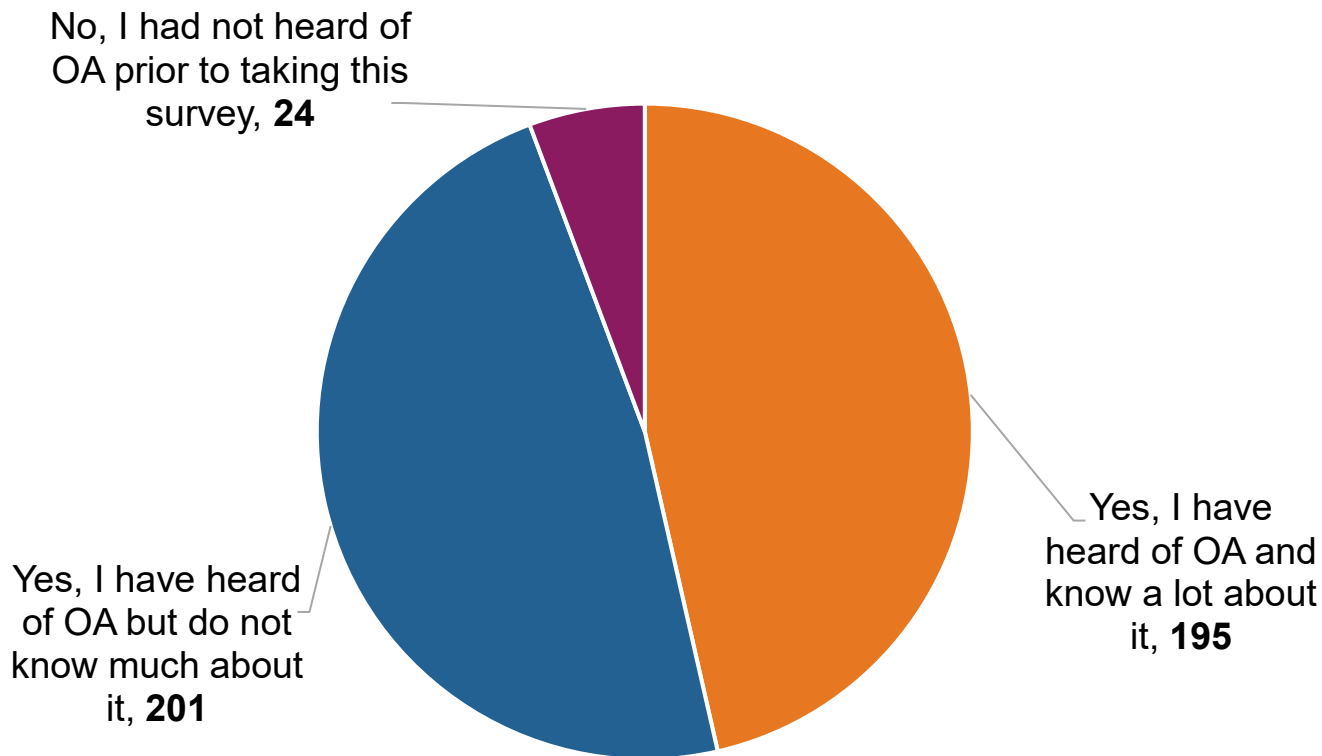Categories with fewer 50 responses were not reported in the figure.

User Experiences Searching for and Accessing OA Publications

The total number of respondents for **accessing** was 411.
The total number of respondents for **searching** was 411.

User Awareness of OA
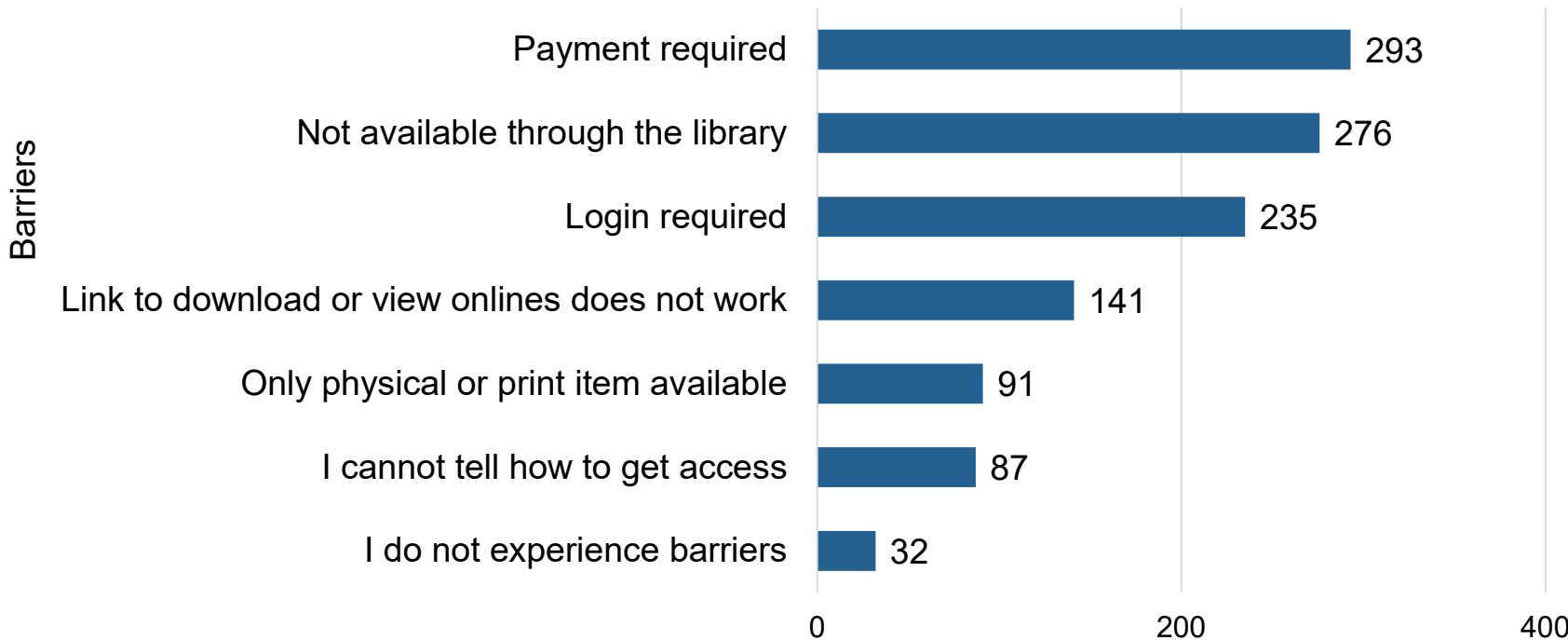

No, I had not heard of OA prior to taking this survey, **24**

Yes, I have heard of OA but do not know much about it, **201**

Yes, I have heard of OA and know a lot about it, **195**
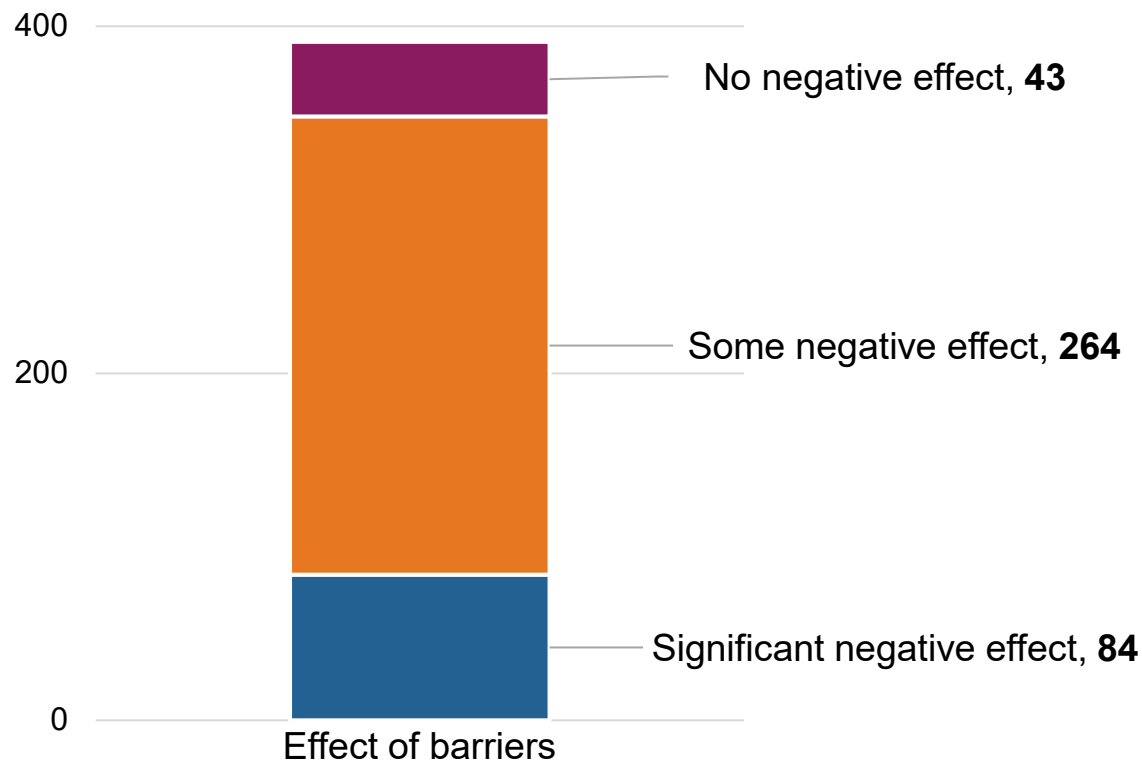
The total number of respondents was 420.

What this means for library staff:

These different areas of OA—publishing, discovery, and access—have and will continue to evolve. It will be critical for library staff to learn more about what users know about each of these areas to continue adapting outreach and instruction to improve users' experiences.

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Barriers Experienced When Unable to Access Full Text

Payment required — 293
Not available through the library — 276
Login required — 235
Link to download or view onlines does not work — 141
Only physical or print item available — 91
I cannot tell how to get access — 87
I do not experience barriers — 32

Barriers

0   200   400

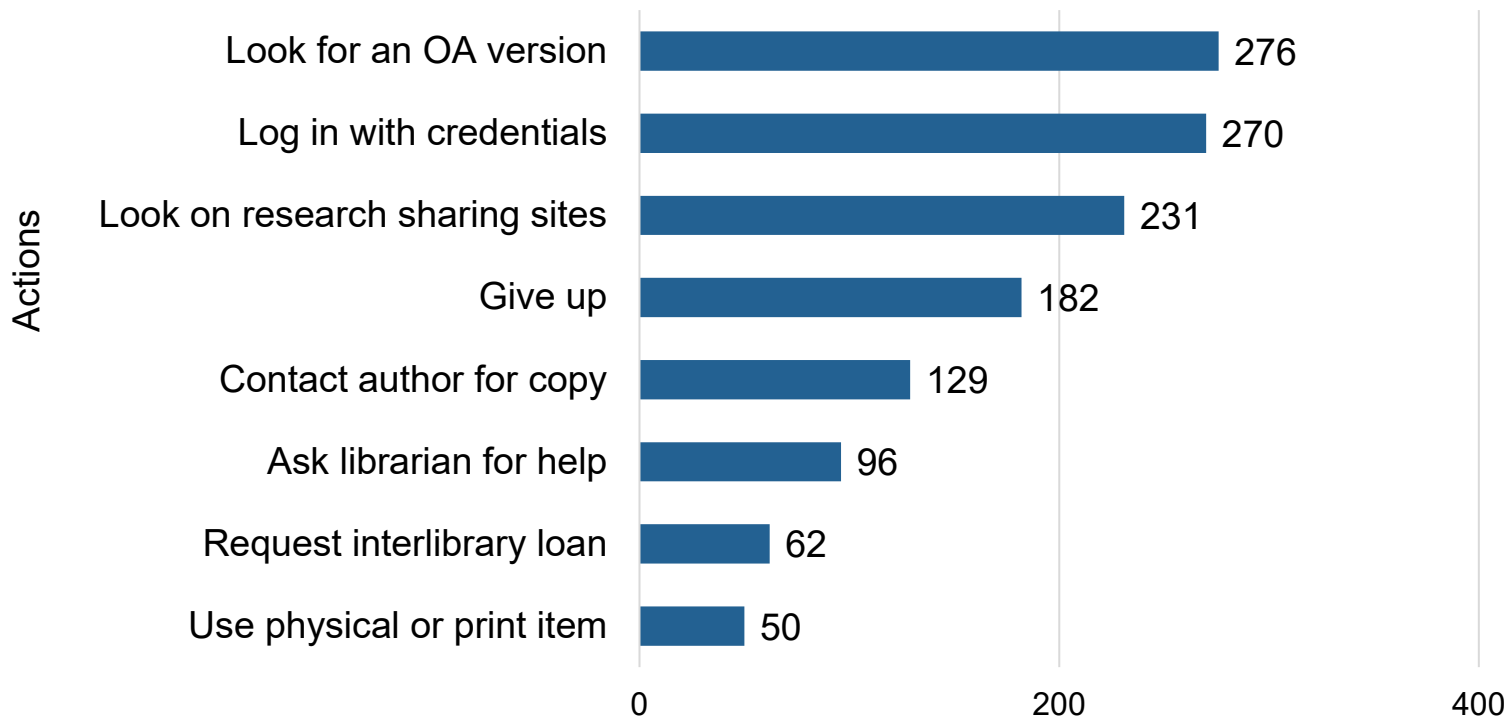*The total number of respondents was 426. Users could select all categories that applied.*

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Effect of Barriers Experienced when Accessing Full Text

The total number of respondents was 391.

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

What this means for library staff:

Library services for finding full-text access after users hit a barrier need to be easier and faster to use and can be promoted as saving users both time and effort.

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Improving metadata to support OA discovery

Creating metadata upstream

"When the start is not good, then the output won't be good as well. So that's something that's really challenging, actually to educate them…and to make sure that they will fill in the right stuff, so the end will be better."

- Metadata specialist, U1

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Coordinating metadata

"For the external stakeholders like [national aggregator], we have agreements on the national level. So, we do that in cooperation with other universities and the National Library of the Netherlands. So, we decide together which metadata elements we include and all the changes about that."

- Repository and CRIS manager, U2

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Dropping metadata midstream

"The words in the abstract in the [national aggregator] are not indexed in our own discovery tool. So, when a specific word is only mentioned in the abstract, you don't find it through our discovery tool, you only find it directly in the [national aggregator]. So, the possibilities to discover publication are bigger directly in [national aggregator] than in our own discovery tool."

- Information Specialist, UAS4

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Duplicates downstream

"You have the duplicate records because [of] the harvest from our own repository, but at the same time, that same record can also be found through [national aggregator] that we also offer through discovery….Maybe someone else harvested it in a third one."

- Library systems manager, U4

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Displaying metadata: Different priorities

"But our websites…we are dependent on the vision of that department of communication….They want to have a very good-looking [laughter] website and we like to have the accessibility rights and the metadata rights."

- Information specialist, UAS1

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Displaying metadata: Distinguishing OA

"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

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What this means for publishers, technology providers, and aggregators:

Engage in conversation with library staff to improve interoperability and discovery experiences. Library staff have a valuable perspective on the interaction of technologies and processes that affect their work and their ability to meet users' needs.

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Metadata for discovery: Identifiers

"It would be helpful if in our discovery tool…it would be possible to search for the DOI. Because that's not easy."

- Library systems and tools manager, U2

OCLC

Metadata for discovery: Interlinking

"Maybe make more, even more linkages so not only the publication and the data set but also media appearances….That would make the information more open because these media appearances or professional articles they are readable for a larger audience."

- Repositories and CRIS manager, U3

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What this means for library staff:

Improving user discovery experiences during the transition to open science requires high-quality, authoritative metadata that supports emerging resource types, aggregation approaches, and user behaviors.

Measuring the effects of library efforts

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Poll Question

What are your thoughts about measuring OA discovery?

A. I am not sure whether OA discovery can be measured.

B. I am not sure if it is worthwhile to measure OA discovery.

C. I think it might be interesting to start talking about how to measure OA discovery.

Measuring user behavior

"It's difficult to say [laughter] what the impact is….
I can't look into the minds of our students and
our PhDs who are trying to discover content,
whether they found it accidentally or on purpose
through whatever ways. We try to educate them. I'm
not sure whether it can be measured."

- Open Access Librarian, U4

OCLC

Role for user assessment

A greater understanding of user behavior across institutional affiliations, roles, and disciplines can help guide the continuous improvement of library staff's OA discovery efforts.

Not so different after all

This study did not find conclusive differences between universities and UASs, although the small scale necessitates additional investigation.

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Finding common ground

Greater collaboration and alignment across the UKB and SHB on OA discovery policies and practices may better support library staff's efforts and improve users' experiences.

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Collaboration with internal stakeholders

Library staff involved with OA come from different
library units and fulfill multiple roles:

- information specialists,
- library systems and tools specialists,
- repository and CRIS managers,
- OA specialists,
- metadata specialists,
- e-resources specialists

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Institutional collaboration

Better integration, collaboration, and alignment on OA within the library and across the institution is needed to support users' engagement with OA.

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Open Access Discovery

oc.lc/oa-discovery-project

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Join us this afternoon!

Open Access Discovery project: next steps

- Breakout sessions round 2
- Room 1.1-1.4, 1st floor
- 13:30-14:30h

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