



Forum for Open Research in MENA  
27 October 2022 (online)  
@Form40pen

# Considerations when developing and implementing an open access policy

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# Today we are talking about:

1. What makes a good OA policy?
2. How can you work with your organisation to implement it?

Sounds simple.....?

# Ha!



So, what makes a good  
OA policy?

Image:  
Danny Kingsley



# This work might have some clues

Wakeling, S., Kingsley, D., Jamali, H.,  
Kennan, M.A., Sarrafzadeh (2022)  
**Free for all, or free-for-all? A content  
analysis of Australian university open  
access policies**

*Information Research*

Volume 27, No 2

[http://www.informationr.net/ir/27-  
2/paper933.html](http://www.informationr.net/ir/27-2/paper933.html)

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[Contents](#) | [Author index](#) | [Subject index](#) | [Search](#) | [Home](#)

**Free for all, or free-for-all? A content analysis of Australian university open access policies**

[Simon Wakeling](#), [Danny Kingsley](#), [Hamid R. Jamali](#), [Mary Anne Kennan](#) and [Maryam Sarrafzadeh](#)

**Introduction.** The purpose of this paper is to understand the characteristics of Australian institutional open access policies and to explore the extent they represent a coherent and unified approach to delivering and promoting open access in Australia.

**Method.** Open access policies were located using a systematic search of forty-two Australian university Websites. A formal open access policy was defined as a document with the terms "open access" and "policy" in the title, and which was located either in the institution's policy library, or elsewhere on the main university Website.

**Analysis.** Content analysis was employed to examine policies across fourteen categories.

**Results.** Only twenty Australian universities were found to have a formal open access policy. There was found to be a wide variation in language used, expressed intent of the policy and expectations of researchers. Few policies mentioned monitoring or compliance.

**Conclusions.** When policies use language which does not reflect national and international understandings, and when requirements are not clear and with consequences, policies are unlikely to contribute to understanding of open access, to uptake of the policy, or to ease of transferring understanding and practices between institutions. A more unified institutional approach to open access is recommended.

DOI: <https://doi.org/10.47989/irpaper933>



# Our research team - we welcome discussion!

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# The paper was referenced in *Nature Index* Oct 2021

nature index

Home News Current Index Annual tables Supplements Client services About

Home > News > Q&A: Australia's chief scientist proposes a centralized national plan for open access

Q+A · 12 OCTOBER 2021

## Q&A: Australia's chief scientist proposes a centralized national plan for open access

Cathy Foley says the country is in a good position to do things differently.

Dalmeet Singh Chavla



Australia's chief scientist, Cathy Foley.

Australia lags behind comparable research-intensive countries in Europe in the development of open-access policies, according to a recent analysis. But the country's chief scientist Cathy Foley, in the role since January 2021, has identified open access as one of her priorities.

Foley sketches a proposal for a central government body to negotiate a national agreement with each publisher on behalf of all institutions. The national body would be responsible for administering a central pool of funds for subscriptions and open access fees.

### Related articles

Australian institutions lag behind on open access adoption  
12 October 2021



Open-access model is a return to the origins of journal publishing  
11 May 2018



Don't let researchers recommend who reviews their work  
22 November 2019



'Bronze' open access supersedes green and gold  
12 March 2018



Articles >

### Subjects

Open access

Research publishing and publications

Advertisement

Australia lags behind comparable research-intensive countries in Europe in the development of open-access policies, according to a recent analysis. But the country's chief scientist Cathy Foley, in the role since January 2021, has identified open access as one of her priorities.

<https://www.natureindex.com/news-blog/australias-chief-scientist-cathy-foley-proposes-centralized-national-plan-open-access>

# Well actually it wasn't the \*paper\* that Nature referenced



bioRxiv posts many COVID19-related papers. A reminder: they have not been formally peer-reviewed and should not guide health-related behavior or be reported in the press as conclusive.

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## Free for all, or free-for-all? A content analysis of Australian university open access policies

Simon Wakeling, Danny Kingsley, Hamid Jamali, Mary Anne Kennan, Maryam Sarrafzadeh

doi: <https://doi.org/10.1101/2021.08.20.457045>

Now published in *Information Research: an international electronic journal* doi: 10.47989/irpaper933



**Abstract** | [Full Text](#) | [Info/History](#) | [Metrics](#) | [Preview PDF](#)

### Abstract

Recent research demonstrates that Australia lags in providing open access to research

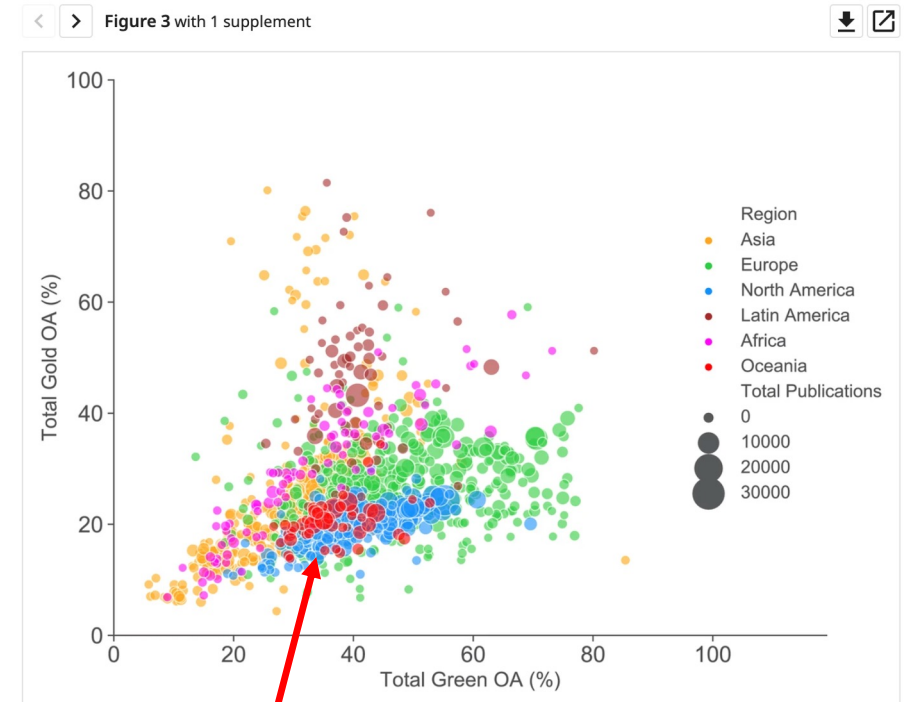
- Preprint 1<sup>st</sup> online - 20 August 2021
- Version 2 posted - 12 Sept 2021
- Nature article - 12 October 2021
- Paper published - June 2022

<https://www.biorxiv.org/content/10.1101/2021.08.20.457045v1?rss=1>

# Why we did the study

- More than 30% of the National Health and Medical Council's funded articles are **not open access** despite a policy requiring OA\*
- Institutional policies and their requirements have an important role in promoting OA publishing of research outputs.
- Providing a 'snapshot' of the state of open access policies in Australian institutions in 2020/21.

\* Kirkman, N. and Haddow, G. 2020. Compliance with the first funder open access policy in Australia. Information Research: an international electronic journal. <https://espace.curtin.edu.au/handle/20.500.11937/79635>



- Australia is comparatively stagnant in OA progress

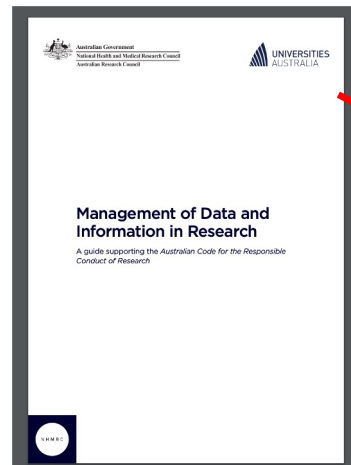
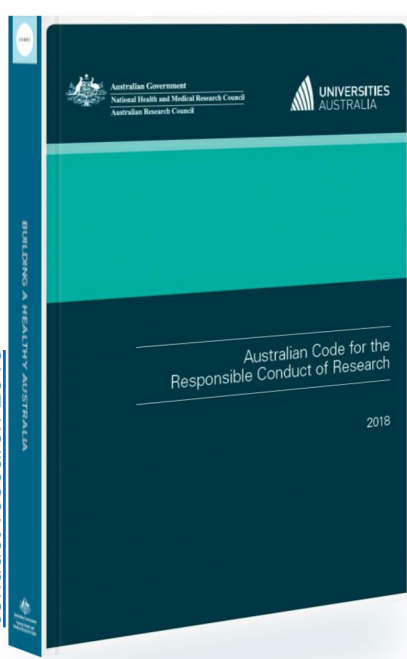
Huang, et al, Meta-Research: Evaluating the impact of open access policies on research institutions, 2020  
<https://elifesciences.org/articles/57067>

# Responsibility for policy is devolved to institutions

Responsibilities of institutions: “Develop and maintain the currency and ready availability of a suite of policies and procedures which ensure that institutional practices are consistent with the principles and responsibilities of the Code.”

“institutions should support researchers to ensure their research outputs are openly accessible in an institutional or other online repository, or on a publisher’s website”.

“Research institutions have a responsibility to **develop and implement policies** and provide facilities and processes for the safe and secure storage and management of research data and primary materials ...”

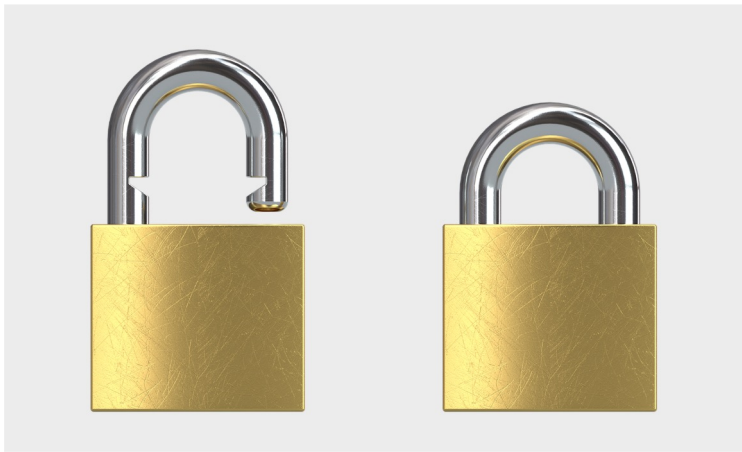


<https://www.nhmrc.gov.au/about-us/publications/australian-code-responsible-conduct-research-2018>

<https://www.nhmrc.gov.au/sites/default/files/documents/attachments/Management-of-Data-and-Information-in-Research.pdf>

[https://online.nhmrc.gov.au/sites/default/files/ethics/draft\\_guide\\_on\\_publication\\_and\\_dissemination\\_of\\_research.pdf](https://online.nhmrc.gov.au/sites/default/files/ethics/draft_guide_on_publication_and_dissemination_of_research.pdf)

# What did we mean when we said 'OA policy'?



Policy categorisations:

- (A) Must say 'open access policy' AND be in the policy library (or sitting in the online university site) AND must 'look like' a policy
- (B) 'Policy' that refers to open access as part of a broader remit
- (C) Open access is included in a guideline or other supporting document
- (D) No reference or documentation



# Identifying policies

Check AOASG website + Check ROARMAP = OA Policies

Search university website for 'policy' to reach policy library

Check any policy using terms: 'Academic Integrity', 'Research Integrity', 'Authorship', 'Publication' & 'Peer Review'.

Search any Procedures and Guidelines

Search university website with the term 'Open Access' to identify any other guidelines or references

*[If none]*

*[If none]*

# Breakdown of the policies of 41 Australian universities (2020)

- Institutions with OA policies – 20
- Institutions with policies that mention OA but are not titled 'OA' – 7
- Institutions that reference OA in Principles, Procedures or Guidelines – 6
- Institutions that have no Policies, Procedures or Guidelines referencing OA – 8



<https://www.studyinaustralia.gov.au/English/Australian-Education/Universities-Higher-Education/list-of-australian-universities>



# Analysis of Institutional OA Policies

- Dimensions of analysis:
  - Definition of OA
  - To whom the policy applies
  - Role of the library
  - Mention of ARC/NHMRC policies
  - Language used to describe the policy directive
  - OA timescales
  - Exceptions to OA requirements
  - Compliance/consequences of policy breaches
  - Institutional positions on APC payments
  - Discussion of copyright
  - Mention of open data requirements/FAIR

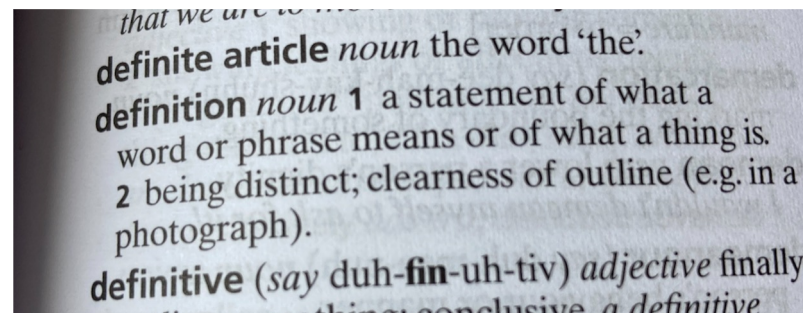
Image:  
Danny Kingsley



# Why look at definitions of OA?

- Open access is a complex space and there is no widespread understanding of what it means amongst the research community
- Definitions are useful when they reflect commonly held understandings which are transferable between people and institutions, nationally and internationally
- Commonly held understandings can make it easier to implement (open or any) policies and initiatives

Accordingly we decided to examine the definitions in Australian university OA policies



# Common OA definitions

Definition	Date	Link
Budapest Open Access Initiative (BOAI)	2002 & 2012	<a href="https://www.budapestopenaccessinitiative.org/boai-10-recommendations">https://www.budapestopenaccessinitiative.org/boai-10-recommendations</a>
Berlin Declaration on Open Access to Knowledge in the Sciences and Humanities	2003	<a href="https://openaccess.mpg.de/policy">https://openaccess.mpg.de/policy</a>
Australian Open Access Support Group (AOASG)	n.d. (page updated 2019)	<a href="https://aoasg.org.au/what-is-open-access/">https://aoasg.org.au/what-is-open-access/</a>
Australian Research Council (ARC)	2017	<a href="https://www.arc.gov.au/policies-strategies/policy/arc-open-access-policy-version-20171">https://www.arc.gov.au/policies-strategies/policy/arc-open-access-policy-version-20171</a>
National Health and Medical Research Council (NHMRC)	2018, revised 2020	<a href="https://www.nhmrc.gov.au/about-us/resources/open-access-policy">https://www.nhmrc.gov.au/about-us/resources/open-access-policy</a>

# Universities with OA policies: What we found

Searches in both Google and Google Scholar revealed that most definitions covered some aspects from the above definitions but only two referenced the sources of their definitions, one referencing AOASG and one BOAI.

	<b>OA policy (N=20)</b>	<b>Other policy referencing OA (N=9)</b>
<b>Definition</b>	18	4
<b>Reference</b>	2	0
<b>No Reference</b>	16	4
<b>No definition</b>	2	5

Many definitions used simplified language. The majority focused on open access only without reference to reuse, licensing and attribution – key concepts in understanding open access (note these concepts are included in the ARC/NHMRC definition)



# What makes a policy successful?

**COMMENT**

**GOVERNANCE** Make more use of the patenting system to regulate gene editing **488**

**ART** Pre-Raphaelites interpreted discoveries of a fecund age **498**

**LAB LIFE** Memoir of neuroscientist and equality advocate Ben Barres **492**

**PUBLISHING** Engage more voices in the debate over Europe's open-access plan **484**



## Do authors comply with mandates for open access?

The first large-scale analysis of compliance with open-access rules reveals that rates vary greatly by funder, report **Vincent Larivière** and **Cassidy R. Sugimoto**.

**L**ast month, European research funders collectively called for research publications to be made free, fully and immediately, so far, 14 funders have signed up. Before that, at least 50 funders and 700 research institutions worldwide had already mandated some form of open access for the work they support. Federally funded agencies and institutions argue that taxpayers should be able to read publicly funded research, and that broader accessibility will allow researchers whose institutions do not subscribe to a particular journal to build on existing research. However, few empirical analyses have examined whether work supported by funding agencies with such mandates actually is open access<sup>1-4</sup>. Here, we report the first large-scale analysis of compliance, focusing on 12 selected funding agencies. Bibliometric data are fraught with idiosyncrasies (see 'Analysis methods'), but the trends are clear. Of the more than 1.3 million papers we identified as subject to the selected funders' open-access mandates, we found that some two-thirds were indeed freely available to read. Rates varied greatly, from around 90% for work funded by the US National Institutes of Health (NIH) and UK biomedical funder the Wellcome Trust, to 23% for work supported by the Social Sciences and Humanities Research Council of Canada (see 'Mandates matter'). Our findings have policy implications.

**FREE FOR ALL** Funders with open-access mandates have varying incentives, opt-out mechanisms, copyright protections, deposit guidelines and other associated infrastructures and requirements. These affect when, how and how much work is made open. Our analysis did not assess licensing and instead counted articles found to be freely available to ▶

They highlight the importance to open access of enforcement, timeliness and infrastructure. And they underline the need to establish sustainable and equitable systems as the financial burdens for science publishing shift from research libraries to authors' research funds.

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- “Funders that allow authors to deposit papers after publication see lower rates of compliance, presumably because authors lose track of this obligation.”
- “Other funders that have lower rates of compliance than the NIH and the Wellcome Trust provide less enforcement and infrastructure.”

<https://media.nature.com/original/magazine-assets/d41586-018-07101-w/d41586-018-07101-w.pdf>

# Language used to describe the policy directive

- A key element of institutional OA policies is the language used to describe the actions of those to whom the policy applies.
- We identified the key word(s) relating to this:

Key word	No of OA Policies	Example
must	6	"... fulltext research outputs <b>must</b> be made openly available where ..."
will	4	"Researchers <b>will</b> ... make publications and data arising out of research openly available for re-use and citation."
requires/required	3	"The University <b>requires</b> all staff and students to deposit Research Outputs ... for the purpose of providing Open Access"
responsible/ responsibility	3	"the following <b>responsibilities</b> are in place ... Secure where possible the immediate unrestricted access to publication"
is to be	2	"material ... <b>is to be</b> deposited in the University's open access institutional repository"
mandates	1	"The University <b>mandates</b> an open access approach ..."
should be	1	"Research Outputs <b>should be</b> forwarded to the University Library for deposit into the institutional repository ... if an open access version is not already available"

# Depositing time

13 of the 20 OA policies specified a timeframe by which an OA version of the research output must be deposited in the institutional repository. In some cases more than one timeframe was specified (selection below)

Researchers are expected by the University to deposit the post peer reviewed and corrected version of their published research (the Author's Accepted Manuscript) in the Institutional Repository or an accredited subject repository **within three months of publication.**

[University of Melbourne](#)  
ne

"All refereed final draft research outputs will be deposited in the institutional repository **after their acceptance for publication.**

[Edith Cowan University](#)

**as soon as possible**, make publications and data arising out of research openly available for re-use and citation.

[Western Sydney University](#)

Researchers are encouraged to **avoid embargoes of greater than 12 months from date of publication.** Where agreements do not allow outputs to be made Open Access within 12 months researchers should make reasonable attempts to negotiate this provision with the publisher.

[University of Adelaide](#)

for the purpose of making these outputs freely available **within twelve months of publication**, or **as soon as possible** in accordance with the relevant publisher copyright, open access and embargo policy

[UNSW](#)

The University supports the underlying principles of open access by making publications freely available online **as soon as possible or within twelve (12) months of publication.**

[University of Queensland](#)

**no later than 12 months after the date of publication.**

[University of Sydney](#)

Open access to the full-text will be available **as soon as is practicable** and **not later than twelve months after publication.**

[UniSA](#)

Research Outputs should be forwarded to the University Library for deposit into the institutional repository **at the time of publication**, if an open access version is not already available.

[Wollongong University](#)

# Timing of deposit versus when openly accessible

In some cases the timing relates to the \*deposit\* of the work, in others it relates to the \*availability\* of the work

Researchers are expected by the University to deposit the post peer reviewed and corrected version of their published research (the Author's Accepted Manuscript) in the Institutional Repository or an accredited subject repository **within three months of publication.**

University of Melbourne  
ne

Researchers are encouraged to **avoid embargoes of greater than 12 months from date of publication.** Where agreements do not allow outputs to be made Open Access within 12 months researchers should make reasonable attempts to negotiate this provision with the publisher.

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**as soon as possible**, make publications and data arising out of research openly available for re-use and citation.

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University of Queensland

Research Outputs should be forwarded to the University Library for deposit into the institutional repository **at the time of publication**, if an open access version is not already available.

Wollongong University

# 'Upon acceptance' requires specific management

Refereed research articles and published conference papers should be deposited to QUT ePrints **upon acceptance for publication** or as soon as a Digital Object Identifier (DOI) for the work is available.

**immediately upon** receipt of a Digital Object Identifier or **acceptance** for publication (where a DOI is not issued)

Systems in place to manage this process

The screenshot shows the QUT ePrints website interface. At the top, there is a navigation bar with 'QUT ePrints' and links for 'Home', 'Browse', 'About', 'Login', 'QUT Home', and 'Contact'. The main content area features the title 'Local in-plane strength and stiffness of stud-to-sheathing fastener connections in LSF wall panels' in green. Below the title, the authors 'Abeyisiriwardena, Tharindu, Peiris, Mithum Chamara Shan, & Mahendran, Mahen' and the year '(2021)' are listed. A 'Request a copy from author' button is visible. The 'Description' section contains a detailed abstract about LSF wall systems. The 'Impact and interest' section includes a 'Search Google Scholar' button and social media icons.

The screenshot shows the ACU (Australian Catholic University) website interface. At the top, there is a navigation bar with 'ACU AUSTRALIAN CATHOLIC UNIVERSITY' and links for 'Home', 'About', 'People', 'Research areas', 'Latest Additions', and a search bar. The main content area features the title 'Carter, Nick (2020) "What shall we do with it now?" : The Palazzo della Cività Italiana and the difficult heritage of fascism. Australian Journal of Politics and History. 66(3), pp. 377-395. https://doi.org/10.1111/ajph.12696'. Below the title, the author 'Carter, Nick' is listed. The 'Abstract' section contains a detailed summary of the article. A 'File access - Request a copy' button is visible. The 'Restricted files' section lists 'Author's accepted manuscript' (UNDER EMBARGO UNTIL 04 OCT 2022) and 'Publisher's version' (UNDER EMBARGO INDEFINITELY).

https://eprints.qut.edu.au/207210/

https://acuresearchbank.acu.edu.au/item/8v8v6/-what-shall-we-do-with-it-now-the-palazzo-della-civita-italiana-and-the-difficult-heritage-of-fascism

# Exceptions to OA requirements




All 20 OA policies specify some exceptions to requirements to make research outputs available OA:

Exception type	No of Policies
Publisher agreement (including embargo)	18
Commercial sensitivity	6
Cultural sensitivity	3
Copyright or licensing restrictions	8
Confidentiality	6
Other legal obligations	2
Already OA material	1
Publisher version of non-OA publications	1
Privacy	1
Royalty payment or revenue	1



# Exceptions to OA requirements

Some of these are either related or the same thing

	Exception type	No of Policies
	Publisher agreement (including embargo)	18
	Commercial sensitivity	6
	Cultural sensitivity	3
	Copyright or licensing restrictions	8
	Confidentiality	6
	Other legal obligations	2
	Already OA material	1
“Version of Record”? 	Publisher version of non-OA publications	1
	Privacy	1
	Royalty payment or revenue	1

# Compliance/consequences of breach of policy

- Only three of the twenty OA policies were found to cover the consequences of a failure to comply with requirements:
  - “The University **may** commence applicable disciplinary procedures if a person to whom this policy applies breaches this policy (or any of its related procedures)” (Macquarie University)
  - “Non-compliance with this Policy **may** constitute research misconduct and/or general misconduct, which will be addressed in accordance with the University’s Enterprise Agreement and relevant disciplinary procedures.” (University of Adelaide)
  - “Breaches of this Policy **may** result in action being taken in accordance with the University Code of Conduct for Research.” (UNE)
- Are these just statements that align with employment contracts?

## 18. University Policies & Procedures

- 18.1 You agree to work in accordance with University policies and procedures as may apply to your duties from time to time.
- 18.2 All policies and procedures will be determined by the University and may be varied from time to time. Relevant policies and procedures may be obtained from the University’s Policy Library located on the University’s website under Staff.

# Paying for publication - 9/20 specifically cover this

(multiple inconsistencies)

Key – **Green** = yes, **Yellow** = implied, **Blue** = with caveats, Blank = no/not mentioned

	ANU	Bond	CDU	CQU	JCU	Adelaide	UNE	Wollongong	UNSW
Does not support hybrid	Green		Yellow	Yellow	Green	Green	Yellow		Green
Does not support Gold (OA journals)	Yellow								
University restriction/advice on use of grant funding			Green		Green				
University discretionary funds provided		Green	Blue	Blue					
No university discretionary funds provided	Yellow				Green	Yellow	Green	Green	
Departmental or local funds provided								Yellow	
College/School needs to approve the 'quality' of the 'Publication'		Green	Green	Green				Green	
Publication must meet ERA requirements			Green	Green	Green				
Supports Green OA						Green		Green	

# Takeaways from the study

The institutional OA policy landscape is messy, with significant differences in:

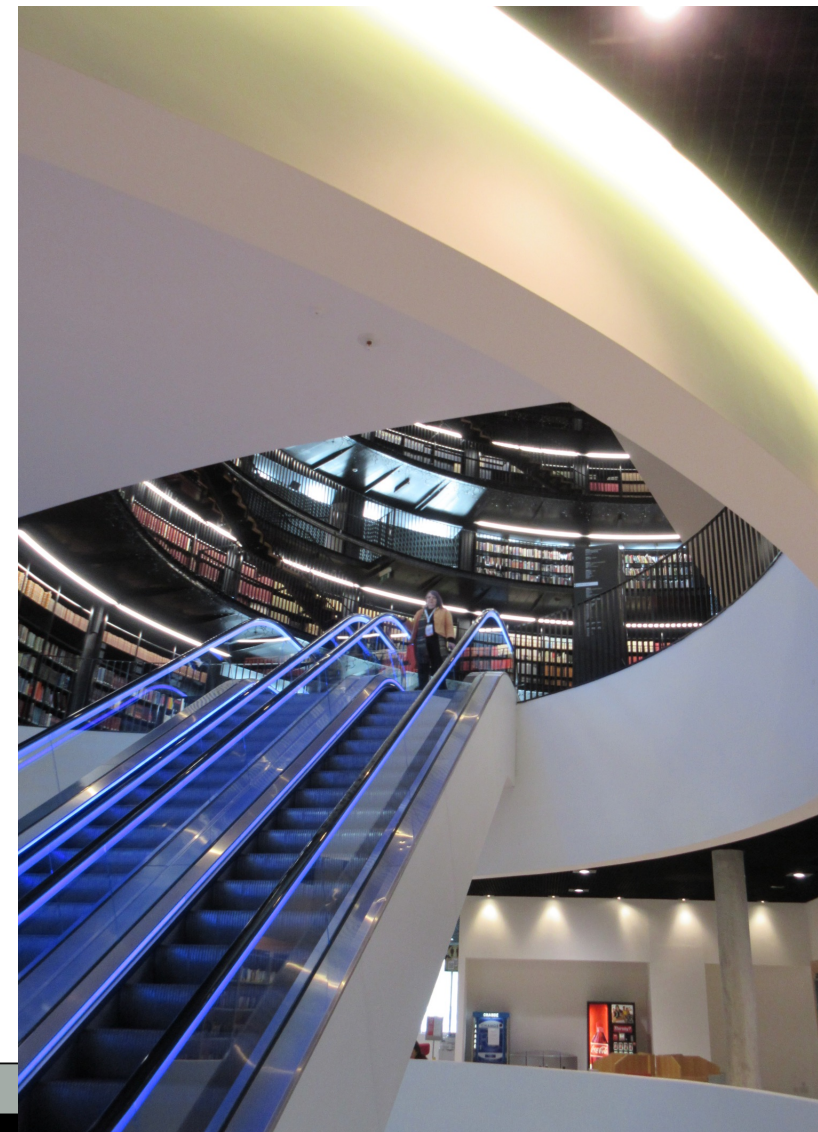
- Definitions of key terms
- Responsibilities of key actors
- Role of library
- Compliance measures
- Exceptions
- Alignment with funder policies
- Perspective on payment of APCs
- Focus on repository vs open access as desired outcome
- ...



Image:  
Danny Kingsley

# Getting your institution on board

Image:  
Danny Kingsley





# Good resources



CAUL - Council of Australian University Librarians / LibGuides / Open Educational Resources Advocacy Toolkit / Home

## Open Educational Resources Advocacy Toolkit

Search this Guide Search

- Home
- Understand OER Advocacy
- Create an Action Plan for OER Advocacy
- Target Your OER Advocacy
- Evaluate Your OER Advocacy
- Resources for OER Advocacy
- About

Open Educational Resources Advocacy Toolkit by Council of Australian University Librarians is licensed under CC BY 4.0 except where otherwise stated.

## Open Educational Resources Advocacy Toolkit

### Introduction to the OER Advocacy Toolkit



<https://caul.libguides.com/oer-advocacy-toolkit>



# Transferable information



CAUL - Council of Australian University Librarians / LibGuides / Open Educational Resources Advocacy Toolkit / Create an Action Plan for OER Advocacy

## Open Educational Resources Advocacy Toolkit

- Home
- Understand OER Advocacy
- Create an Action Plan for OER Advocacy**
  - What is an OER Advocacy Action Plan?
  - Why Create an OER Advocacy Action Plan?
  - What Does an OER Advocacy Action Plan Look Like?
  - Identifying OER Advocacy Opportunities

## Create an Action Plan for OER Advocacy

This section of the *CAUL OER Advocacy Toolkit* guides you in identifying opportunities, partners and stakeholders, developing strategies and formulating a plan for OER advocacy, including:

1. What is an OER Advocacy Action Plan?
2. Why Create an OER Advocacy Action Plan?
3. What Does an OER Advocacy Action Plan Look Like?
4. Identifying OER Advocacy Opportunities
5. Gathering Evidence for Your OER Advocacy Action Plan
6. Identifying Barriers to OER Adoption
7. Identifying OER Partners and Stakeholders
8. Example OER Scenarios and Advocacy Plans.

# Good resources



OSFHOME ▾

T15: How to introduce and implement ... Files Wiki

FSCI 2021 /

## T15: How to introduce and implement policy in your institution and still have friends afterwards

Contributors: [Danny Kingsley](#), [Sarah Shreeves](#)

Date created: 2021-05-18 05:56 AM | Last Updated: 2022-08-03 04:24 AM

Category:  Project

Description: *Course site for FSCI2021's T15 - How to introduce and implement policy in y*

License: *CC-BY Attribution 4.0 International* ⓘ

Wiki 

T15 - How to introduce and implement policy in your institution and still have friends afterwards

Danny Kingsley & Sarah Shreeves

Abstract: As momentum increases toward an open future, questions arise around the implications for research institutions. There are multiple challenges around policy, advocacy, and technology surrounding open research practice. Much of the work in the scholarly communic...

- Online course from the FORCE11 Scholarly Communication Institute (FSCI)
- All videos and slides available

<https://osf.io/7whxe/>

# Summary

- Understand who your stakeholders are
  - These will be people who both benefit and don't from your policy
  - How are decisions made in your institution?
- Understand what their perspective is
  - Different people have different motivations
- Anticipate the reasons why your stakeholders might *\*not\** agree with your policy
  - How do those motivations influence their responses to your policy
- How prepared are you?
  - Do you have the support, workflow and infrastructure in place to implement your policy?



# Thanks & Questions

- This is not simple!
- Let's continue the conversation:
  - @dannykay68
  - dkingsley@usc.edu.au

Image:  
Danny Kingsley

