

Metadata Librarians for Open Access: A Path Towards Sustainable Discovery and Impact for Open Access Resources

Jennifer Chan, Erica Zhang, Hermine Vermeij, John Riemer

Abstract:

Support by academic libraries for open access (OA) over the past three-plus decades has largely focused on the development of digital infrastructure, promotion of open access publishing, support of policy-driven access mandates, and more recently, adoption of transformative agreements. Libraries have correspondingly created a broad array of scholarly communication roles to support these varied approaches. Surprisingly, one area of open access support that has received less attention from libraries is the facilitation of description and discovery of open access resources through the creation of robust original metadata. Expertise in *Organization of Recorded Knowledge and Information* represents a core competency of librarianship, yet the current academic library landscape shows few positions that specifically apply this expertise towards support for OA resources. Efforts to describe OA resources typically fall below those dedicated to licensed resources and pale in comparison to OA advocacy work, repository, publishing and other services. This case study offers an example of how one large academic library has introduced a metadata librarian position focused on description of open access resources into its activities supporting open access.

For decades, commercially licensed resources have benefitted from metadata enhanced layer by layer by commercial and library professionals alike. With increased focus and funding being devoted to open access driven by governmental, institutional, and private funders, attention is critically needed to ensure that these new resources obtain the description necessary to allow them to be useful. Metadata librarians focused on open access resources can work with array of positions, such as repository managers and other digital asset management professionals, to ensure that open access resources are properly ingested and managed, and that metadata practices are aligned with best practices for preservation and long-term access. OA metadata librarians could be responsible for developing and implementing metadata standards and practices for open access resources like scholarly articles, data sets, and other digital objects. These standards would help ensure that open access resources are accurately described and discoverable alongside purchased resources, making them more accessible to researchers and other users.

In addition to their technical responsibilities, OA metadata librarians can also play key roles in advocating for open access resources and educating library staff and users about the importance of metadata in supporting discoverability and accessibility. Through participation in professional organizations and initiatives focused on open access and metadata, OA metadata librarians can help raise awareness of the importance of metadata in supporting open access resources, their sustainability, and ultimately, their impact.

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Metadata Librarians for Open Access: A Path Towards Sustainable Discovery and Impact for Open Access Resources

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ABSTRACT

Support by academic libraries for open access (OA) over the past three-plus decades has largely focused on the development of digital infrastructure, promotion of open access publishing, support of policy-driven access mandates, and more recently, adoption of transformative agreements. Libraries have correspondingly created a broad array of scholarly communication roles to support these varied approaches. Surprisingly, one area of open access support that has received less attention from libraries is the facilitation of description and discovery of open access resources through the creation of robust original metadata. Expertise in *Organization of Recorded Knowledge and Information* represents a core competency of librarianship, yet the current academic library landscape shows few positions that specifically apply this expertise towards support for OA resources. Efforts to describe OA resources typically fall below those dedicated to licensed resources and pale in comparison to OA advocacy work, repository, publishing and other services. This case study offers an example of how one large academic library has introduced a metadata librarian position focused on description of open access resources into its activities supporting open access.

For decades, commercially licensed resources have benefitted from metadata enhanced layer by layer by commercial and library professionals alike. With increased focus and funding being devoted to open access driven by governmental, institutional, and private funders, attention is critically needed to ensure that these new resources obtain the description necessary to allow them to be useful. Metadata librarians focused on open access resources can work with array of positions, such as repository managers and other digital asset management professionals, to ensure that open access resources are properly ingested and managed, and that metadata practices are aligned with best practices for preservation and long-term access. OA metadata librarians could be responsible for developing and implementing metadata standards and practices for open access resources like scholarly articles, data sets, and other digital objects. These standards would help ensure that open access resources are accurately described and discoverable alongside purchased resources, making them more accessible to researchers and other users.

In addition to their technical responsibilities, OA metadata librarians can also play key roles in advocating for open access resources and educating library staff and users about the importance of metadata in supporting discoverability and accessibility. Through participation in professional organizations and initiatives focused on open access and metadata, OA metadata librarians can help raise awareness of the importance of metadata in supporting open access resources, their sustainability, and ultimately, their impact.

Keywords: Open Access, Open Access Support, Metadata Librarians, Cataloging

INTRODUCTION

Support by academic libraries for open access (OA) over the past three-plus decades has largely focused on the development of digital infrastructure, promotion of open access publishing, support of policy-driven access mandates, and more recently, adoption of transformative agreements (Hudson Vitale, et al., 2022). Libraries have correspondingly created a broad array of scholarly communication roles to support these varied approaches (Thomas, 2013). Surprisingly, one area of OA support that has received less attention from libraries is the facilitation of description and discovery of OA resources through the creation of robust original metadata. Expertise in *Organization of Recorded Knowledge and Information* represents a core competency of librarianship, yet the current academic library landscape shows few positions that specifically apply this expertise towards support for OA resources (ALA's Core Competences of Librarianship, 2022). Within libraries, efforts to describe OA resources typically fall below those dedicated to licensed resources and pale in comparison to library engagement in OA advocacy work, repository administration, publishing and other related services. For decades, commercially licensed electronic resources have benefitted from metadata enhanced layer-by-layer by commercial and library professionals alike (Jul, 1998, p. 68). More recently, with increased focus and funding being devoted to OA driven by governmental, institutional, and private funders, attention is critically needed to ensure that these open resources also obtain the description necessary to allow them to be useful (Nelson, 2022). Yet, as a consequence of the labor spent to enhance description of licensed resources but not *open* ones, the discovery of OA content by end-users can be, as Bullock laments in his 2021 article, "surprisingly hard," (p. 68). McCollough in his exploratory study of OA monograph discoverability supports this idea when he found that, from his sample of OA resources, "OA monographs are not as discoverable in library systems as they could be" (p. 191). Chumbe, Kelly, and MacLeod's article points out the invisibility of OA content in hybrid journals, noting that without article-level OA metadata, discovery services "unintentionally...are keeping OA content behind subscription-walls" (2015, p. 145).

This case study offers an example of how one large academic library has introduced a metadata librarian position in its technical services department focused on description of OA resources into its activities supporting OA.

CASE STUDY: METADATA LIBRARIAN FOR OPEN ACCESS (MLOA)

Institutional Context

The UCLA Library serves the UCLA campus community, the greater Los Angeles community, as well as the broader international community, both online and at its various physical locations on campus. Resource Acquisitions & Metadata Services (RAMS) functions as the main cataloging unit in the UCLA Library and is primarily responsible for providing access to more than 90,000 new titles annually, including locally-digitized and curated materials, in various formats and languages, using a variety of metadata schemas. The department is composed of 13 FTE librarians and 30 FTE staff, including dedicated language and subject catalogers as well as format-specific catalogers.

Within a broader context, the UCLA Library is one of ten University of California (UC) libraries served by the California Digital Library (CDL), which “provides services to and on behalf of the UC system as a partner and collaborator to the UC campus libraries” (CDL, 2019). CDL provides services related to shared collections, such as shared print, systemwide or multi-campus electronic resource subscriptions, and shared cataloging (discussed further in the article), as well as the UC institutional repository, eScholarship. Historically, the UC system has operated in a distributed library environment, where each campus and CDL were on separate integrated library systems (ILS). The UCLA Library used the Voyager ILS from 2004 to 2021. However, in July 2021, all UC Libraries migrated to one ILS, Ex Libris’s Alma and Primo VE, in a systemwide implementation, with a new discovery portal called UC Library Search.

UCLA Library OA Cataloging Landscape

Within the UC system, CDL’s Shared Cataloging Program (SCP) functions as a central cataloging unit for all UC campuses (Deng, 2022b). In addition to providing access to licensed e-resources acquired for UC, SCP provides a workflow for campus bibliographers or catalogers to submit cataloging requests for open access resources to SCP, which evaluates the request and either sources existing records from vendors or OCLC, or performs original cataloging. Prior to the systemwide ILS migration, SCP distributed records to all campuses to locally ingest into their individual library systems, including UCLA’s Voyager. SCP also developed infrastructure and workflows for the maintenance of bibliographic records, re-distributing records as needed to keep local records up to date with URL changes, for instance. Since the 2021 systemwide migration, SCP’s methods have changed, but its mission has remained consistent. Notably, with regard to prioritization of work, SCP prioritizes paid and licensed resources before OA resources (Deng, 2022a). Additionally, while SCP is able to centrally manage OA journals and large OA collections, its scope of work does not currently include individual monographs and other individual campus resources.

Locally, within RAMS, cataloging and maintenance for OA resources was conducted on an ad hoc basis, as priority was also typically given to paid resources, and also distributed throughout the department. Given the lack of best practices around applying OA metadata, OA resources were also not necessarily tagged as such. As a result, this made discovery and access of these resources challenging within the library catalog.

Conceptualizing a Metadata Librarian for Open Access (MLOA) Position

In 2019, a metadata librarian position became vacant within RAMS' Subject Specialists Team, a small team of catalogers responsible for cataloging a wide range of print, electronic, and digital materials, which include arts, humanities, biomedical and physical sciences, and social sciences. With the vacancy, the department saw an opportunity to rethink a cataloging position that would align with the UCLA Library's strategic directions as well as broader UC commitments and priorities, particularly those efforts around support for OA. As evidenced by UCLA's early embrace of UC OA policies to expand access to UC faculty and staff publications (Office of Scholarly Communication, n.d.), its Affordable Course Materials Initiative (UCLA Library, 2023a), and its OpenUCLA initiative (2022) in celebration of UCLA's centennial (2019-2020), OA was becoming an increasingly important priority for the campus.

Taking stock of these local initiatives in addition to emerging researcher needs and conversations happening within scholarly communication at large, the department pinpointed the cataloging of OA resources as a potential new opportunity for RAMS that connected with UCLA and the UC system's commitments to advancing scholarly communication through OA initiatives. Notably, many of these efforts focused on creating and publishing scholarly works as OA; once they are published, however, how discoverable and accessible are these works to the research community? As shown by Bullock in 2021, McCollough in 2017, and Chumbe, Kelly, and MacLeod in 2015, there are multiple challenges to the discovery of OA resources, such as low rates of inclusion of cataloging records within library catalogs. Metadata plays a critical role in addressing these challenges. These findings also reveal opportunities to make an impact with OA metadata for OA monographs, journals, or both, and through cataloging, e-resource management, or some combination of these types of library functions.

Given the challenges of OA metadata and its impact on discovery, cataloging and metadata librarians can offer their expertise in description and subject analysis, data standardization, classification, identity management and authority control, and more (Cataloging Competencies Task Force, 2017) in order to improve access to OA resources. As such, technical services departments such as RAMS can be well-positioned to support the critical discovery and access stages of these resource lifecycles, resources that will make up an increasingly larger portion of the scholarly record.

Making the Case for MLOA

With these questions and opportunities in mind, RAMS leadership developed a needs statement for a new Metadata Librarian for Open Access, outlining why a position dedicated to cataloging OA resources would be a strategic need in the coming years, how such a position would align with and complement existing library support for OA, and what types of OA and freely available resources the librarian would catalog, in addition to some coverage of the gaps left by the previous librarian's departure.

RAMS leadership presented the proposal to the Associate University Librarian (AUL) for Collection Management and Scholarly Communication, receiving a positive reception. With buy-in from RAMS' AUL as well as UCLA's scholarly communication librarians, RAMS then set to work drafting the official job posting. The department surveyed the landscape of existing job postings for examples of similar positions elsewhere and found none where OA resources were a focus of the metadata position. As such, to develop the job position description, the department consulted with campus stakeholders and brainstormed OA-related responsibilities that had been either neglected or distributed across the department.

The proposed position received the support of the UCLA Library administration and was approved and posted in September of 2019 (UCLA, 2019). The new position was also advertised on various cataloging-related listservs, and after a six-month recruitment period, was filled in March 2020.

IMPACT

Quantitatively speaking, the impact of having a cataloger dedicated to OA resources, currently scoped to predominantly monograph cataloging, has been the increase of new OA resources cataloged and discoverable in UC Library Search, as well as an increase of existing resources tagged as OA. As of the writing of this article, approximately 4,000 records for OA resources have been newly cataloged and added in UC Library Search, either locally or in collaboration with SCP. Another approximately 7,500 existing records for OA resources have been enhanced with OA metadata. Through participation in print cataloging workflows, the cataloger has also identified approximately 200 OA versions of materials UCLA Library holds in print, thus providing increased access to existing print resources in the collection. These enhancements ensure that users can find and filter for OA resources in UC Library Search, which can be important particularly for communities of users who may not have log-in credentials. Since the cataloger works in the OCLC WorldCat database, these new records as well as enhanced records are also available to all libraries who use OCLC bibliographic records, and to all users who search for resources through WorldCat.

One particular goal that RAMS envisioned for this position was providing metadata support for the open research outputs of different UCLA campus units, including the library, that publish important scholarly materials outside of traditional publishing pipelines. Unlike many electronic packages offered by well-resourced publishing vendors, metadata for these open resources often do not have automated mechanisms into UC Library Search. Providing dedicated metadata support for these materials ensures that these resources created by our UCLA community are discoverable and accessible as open access via UC Library Search. A sampling of open access resources created by UCLA entities include:

- oral histories by the UCLA Library Center for Oral History Research (UCLA Library, 2023b);
- collections digitized through the Modern Endangered Archives Program (UCLA Library, 2023c);
- think tank reports from the Williams Institute out of the School of Law (2023); and
- videos from the Mellon Foundation Sawyer Seminar “Sanctuary Spaces: Reworlding Humanism,” developed by the UCLA Luskin Institute on Inequality and Democracy (2022).

Other types of resources identified as OA through these workflows include music scores, grey literature such as government publications and NGO reports, artists’ books, museum catalogs, and more.

In terms of internal impacts, having a dedicated OA metadata librarian has helped establish a clear point of contact for general OA cataloging requests, slowly centralizing and bringing together the different requests for OA resources of interest to selectors. New documentation has

also been created as new processes and workflows are established, including more formal procedures for requesting general OA resources for cataloging, as well as local metadata practices for OA resources, in line with the technical configuration of Alma and Primo VE. These local practices have also been adopted by other cataloging units on campus, such as the Law Library.

Perhaps more qualitatively, establishing this position has resulted in increased attention to OA resources within RAMS and the UCLA Library. Along with a clearer line of communication for cataloging OA resources between public service librarians and technical services, having staff primarily focused on issues around OA has impacted more than just collection numbers. One example of this is that conversations and efforts around equity, diversity, and inclusion have included OA as an equity, diversity, and inclusion (EDI) consideration, both in collections-related efforts, such as the drafting of a collection development policy template, as well as in ethical description and critical cataloging initiatives.

Having a librarian focused on open access metadata has also positioned the UCLA Library to lead in systemwide conversations and initiatives related to OA resource management. This has included co-chairing a UC Open Access Resource Management Task Force (SILS, 2021), a group charged to investigate how management of OA resources might take shape after the migration of the separate UC campuses' ILS' into one systemwide ILS in 2021. One of the key deliverables the Task Force developed was a set of principles for OA resource management at UC Libraries, including principles such as:

- “OA resources selected by one campus should be made available for the discovery tools of all campuses;”
- “Cataloging priority for OA resources needs to be parallel to that for paid/licensed resources;” and
- “OA resources will be clearly labeled so that this material is discoverable in UC Library Search (Johnson et al., 2021, pp. 4-5).”

The work of the Task Force then led to the formation of a subsequent OA resource management project team to translate principles into more concrete workflows and practices across the UC system, currently ongoing.

Beyond participation on OA resource management at a systemwide level, having a dedicated position for OA cataloging has also created a clear responsibility within the library for thinking about and advocating for needed changes in metadata standards and best practices at the national level to support discovery of OA resources. One example of this has been advocating for changes to the Program for Cooperative Cataloging's Provider-Neutral E-Resource MARC Record Guide (2019), a document that details cataloging best practices for electronic resources; while the aim of this document is to reduce duplication of catalog records for the same electronic resource hosted by different vendors, a consequence of following these guidelines is the inability to note in a catalog record an electronic resource's OA status, in effect rendering these OA resources invisible.

DISCUSSION

Just as the 2015 Finlay article examining library institutional support for scholarly communication notes that “the extent to which libraries are investing money and personnel into components of the

scholarly communication ecosystem is something that should be of concern to all stakeholders, (p.3), similarly, library expenditures on support for *open* are important to take into account. Despite decades of activity by libraries in support of OA and open scholarship, attempts to examine the financial costs to academic libraries have only recently taken place, with limited glimpses offered by the Canadian Association of Research Libraries (CARL) in 2019, as well as by the Association of Research Libraries (ARL) through a survey of its members in 2022.

In the ARL survey, 46 of its 102 member institutions responded, and support for open was broadly categorized into five areas of activity:

- Read-and-publish or transitional agreements (64% of spending)
- Institutional repository services (18% of spending)
- Non-APC-based OA publishing models (10% of spending)
- Article processing charges (APCs) or OA funds (4% of spending)
- OA journal hosting and publishing services, and open monographs (4% of spending)

The majority of reported spending was in the category of read-and-publish agreements that cost those reporting a total of \$20 million USD, and overall spending to support *open* was reported to be at the cost of \$32 million USD. (Hudson Vitale, et al., 2022)

It is important to note that the study revealed that just fourteen scholarly publishers were common among the institutions who reported read-and-publish agreements, (Hudson Vitale, 2022, p.7). As concerns about equity, diversity, and inclusion in scholarly communication continue to be raised, that such a concentration of resources benefits mostly commercial journals, from barely more than a dozen publishers, cannot be seen as anything other than problematic. This is particularly true when one takes into account OA journals published through open source platforms. One example, Open Journal Systems (OJS), by Public Knowledge Project, was founded in 2001, and today hosts more than 34,000 scholarly journals that are frequently scholar-led and are typically not part of read-and-publish agreements (Willinsky, OAI13). Just a subset of these publications appears within the Directory of Open Access Journals (DOAJ) registry of 19,869 registered journals (as of September 2023). None of these journals can be automatically assumed to enjoy the benefits of enhanced description and increased discoverability that might be afforded to them through a position dedicated to metadata for OA resources. While financial support for these other endeavors ranges between 4% and 18% of spending and falls short of the \$20 million spent on read-and-publish, this still amounts to millions of dollars being spent by libraries to support non-article-focused open scholarship.

As the number of OA resources continues to grow via read-and-publish (i.e., transformative or transitional) agreements and other types of library-supported activity, the need and urgency for accurate and efficient description of these resources to ensure their access and potential use is magnified. It is important to consider that institutional and library support for *open*, not unlike Thomas's description of *scholarly communication*, is something of a moving target (2013, p.167). The range of support for *open* should therefore be understood to be potentially broader than the five areas reported by the ARL survey.

Just as with licensed resource metadata, OA resource metadata benefits from dedicated attention, as the impact of having a dedicated cataloger for OA resources at the UCLA Library the last few years has affirmed. In fact, there are many opportunities for impact in additional areas of OA metadata support; while the position at the UCLA Library has thus far focused primarily on

cataloging OA monographs, such a position could also be developed to address OA metadata support via cataloging other materials such as OA journals, via e-resource management, and more. Regardless of the direction of such a position, a recognized locus of responsibility should exist within an institution's/library's cataloging unit, because if stewardship of OA resource metadata is generally a part of everyone's job duties, then it effectively will be no one's responsibility.

While dedicated OA metadata support is important for meeting institutional cataloging needs for OA resources, it can also have a broader impact on addressing the outstanding challenges as well as opportunities for this growing body of scholarship. Such issues include, among others:

- a shared definition of OA as it relates to library catalog display and faceting;
- continuing standards development for OA metadata, following National Information Standards Organization's development of "Access and License Indicators" in 2015, as well as efforts over the years by the MARC community to introduce OA-related changes to the MARC format, such as the 2022 proposal "Designating Further Open Access and License Information for Remote Online Resources in the MARC 21 Formats" (German National Library, 2022);
- advocacy to metadata providers regarding accurate and consistent use of OA metadata;
- accuracy and granularity of access metadata for resources such as hybrid journals;
- link maintenance, combined with publisher use of persistent identifiers;
- usage data for OA resources not published or aggregated by vendors using Standardized Usage Statistics Harvesting (SUSHI) and Counting Online Usage of Networked Electronic Resources (COUNTER); and
- digital preservation of these resources for long-term access to the scholarly record.

In this vein, establishing OA resource management-focused committees within professional associations or stand-alone groups would be welcome developments.

OA metadata librarians contribute to the sustainability of OA resources. Data tracked by researchers Philipp and Mattern reported that 55% of publications from 2018 and 2019 were OA. This is notable since many transformative agreements were inked in the years after, and new agreements announcing additional OA publications continue to be announced. As the number of OA resources continues to grow, there is an urgent need for effective and efficient description of these resources.

Even if a library may not yet have the opportunity to develop an FTE position devoted to cataloging OA resources, recognizing where OA resource management may already be taking place within the library or institution can be an important part of an overall OA strategy. For instance, the work being done at Penn State University Libraries to increase the visibility of OA resources important to their community is one example that illustrates the kind of OA metadata support libraries may already have the expertise in-house to provide (Edmunds & Enriquez, 2020). This has also been the case at the UCLA Library. The varied nature of OA resources and workflows has meant that OA work continues to be distributed rather than concentrated in one role, even as having a dedicated cataloger for OA resources has resulted in more attention to the importance of metadata for OA resources within the UCLA Library. The connections and collaborations between the MLOA position and e-resource management librarians, serials catalogers, the UCLA Digital Library Program, and the Law Library, as well as systemwide partners such as SCP and eScholarship staff, highlight the various functional and subject areas where librarians are already

providing metadata support for OA resources. Such units can collaborate to form a cohesive strategy for managing OA resources of relevance to the university or consortium and ensure that OA resources are managed in a sustainable way, and that metadata practices are aligned with best practices for preservation and long-term access.

As libraries strategically shift their focus toward OA resources in response to growing licensing costs and a desire for equity in reader access, it becomes more important to ensure that high-quality, accurate metadata for those resources exists. Devoting time, energy, and staff resources to this metadata, regardless of whether or not it is in a dedicated FTE, should be a concern for institutions that purport to make OA a priority. Just as libraries should have a cataloging plan in place before accepting “free” gifts, making metadata part of the OA conversation will ensure that OA resources receive the attention and description that paid-for resources currently do.

Ultimately, by applying the core librarianship competency of knowledge and information organization toward support of OA, roles like Metadata Librarian for Open Access create a pathway for library engagement in support of *open* that lowers participation barriers for libraries that may otherwise be limited in their abilities to pursue other avenues. As the growth of OA resources continues, specialized positions that focus on metadata are necessary to support effective discoverability and access to these resources. OA metadata librarians can help ensure consistency and completeness in describing OA resources, support the effective and efficient management of these resources, and advocate for the important role metadata plays in supporting all OA efforts. To improve the long-term sustainability and success of library efforts to support OA, academic libraries should consider investing in this specialized role to support the growth and sustainability of open scholarship.

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