

Project to Advance Open Monograph Opportunities at UC: Scope of Work for Tracks A and B

The Council of University Librarians (CoUL) established the “Project to Advance Open Monograph Opportunities at UC” (“Project”) in summer 2024 to further pursue open monograph pathways and expand support for UC authors, at scale and through systemwide initiatives.¹ This Project will enable the UC Libraries to appropriately deploy earmarked funds for open monograph investments in FY 2024/25 and carry-out the necessary analyses to strategically expand and pursue further and new open monograph publishing opportunities for UC in FY 2025/26 and moving forward.

This Project is composed of two tracks of work, which will be initiated and run simultaneously.

Track A. Near-term open monographs investment, to be led by Project Transform with CoUL scoping, criteria and endorsement:

- Investment of the earmarked “tranche 3” Augmentation Funds on open monographs in FY 2024/25 (i.e., by June 2025);
- CoUL to determine investment amount and criteria/scope to inform Transform;
- CoUL and Transform to determine staff time investment (FTE/%) to be made by Project Transform and/or SCLG ;
- CoUL and Project Transform will use the established processes and protocols for spending augmentation funds.

Track B. Open monographs landscape analysis & recommendations, to be advanced by a time-limited project team composed of scholarly communication experts and librarians, and to include SCLG representatives:

- Completion of an open monographs landscape and SWOT analysis by spring/summer 2025 (i.e., a [Pathways to Open Access](#) analysis), to inform UC’s strategic investments (short, medium and long-term) that directly support and increase open monograph publishing and reading opportunities for UC authors, starting in FY 2025/26;
- CoUL to determine, as an input, the total ongoing tranche 3 augmentation funds available for open monograph investments in FY 2025/26.

In spring and summer 2024, CoUL will verify the total amount (\$) from the third tranche of the augmentation funds that should be spent on open monographs by June 2025 (*track A*). Further, CoUL, Project Transform and SCLG will affirm the appropriate scope and criteria for the investment or investments, including pursuit of specific pilots.

The appended charge describes the work, responsibilities and deliverables for the landscape analysis and recommendations (*track B*).

¹ [The UC Libraries annual plans and priorities for FY 2023-24](#) outlines the libraries’ shared commitment to “explore additional opportunities to strategically advance open scholarship at scale and through systemwide initiatives,” including for open monograph opportunities.