Building Effective Outreach Strategies for Open Access Book Initiatives: Lessons Learned from the Open Book Collective

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As Open Access (OA) book publishers, and especially Diamond Open Access publishers, increasingly turn towards membership programs to support their work, effective outreach has become ever more important. For such publishers and for us at the Open Book Collective (OBC) sustainability depends on successfully convincing supporters that our work, and in our case that of the publishers and infrastructure providers that are our members, is relevant to the libraries and other organizations that we are asking for ongoing financial support. In many cases, this also means speaking not just about individual publications, publishers, or publishing service providers, but issues connected to OA publishing more widely. For that reason, a key feature of our outreach has been stimulating conversation and engagement around the OBC, the platform, and the future of OA books.

In this blog post, we provide an account of how we have responded to the challenge of developing an effective outreach strategy, with the aim of sharing and archiving our experiences so that others may benefit from what we have learned, especially initiatives looking to engage with libraries and other institutional stakeholders. We document the development of the OBC’s outreach strategy and highlight the importance of effective outreach efforts in promoting wider access to scholarship.

### Turning to our communities

The OA communities face several obstacles when it comes to outreach: misunderstanding and misinformation have been major issues, and the community has worked hard to dispel these myths. ¹ Now that OA has become more widely embraced, other obstacles include navigating and adjusting an increasingly complex OA policy environment, limited funding, language barriers, and a lack of necessary infrastructure.

To address these challenges, we turned to our communities. A founding principle of the OBC is that collaboration is fundamental in co-creating a more sustainable future for OA book publishing. We built to some extent on existing collaborative relations: OA publishers often work with libraries, funding agencies, and research institutions to promote the OA movement and improve access. We were keen to explore how such collaboration might be scaled. For example, to understand the librarians’ perspective about the adoption and support of OA in libraries, we hosted workshops ² with librarians from the U.S., U.K., and EU exploring the challenges they face in supporting different OA models. We also gathered OA publishers and service providers together to explore their experiences of outreach. We also engaged with our community in a range of other forums, including on social media, at events, and in webinars. From these conversations, we crafted our outreach strategy. In what follows, we will share our experience around two primary areas: email outreach to libraries and our approach to engaging OA communities via our social media presence.

### Tailoring email outreach to libraries

In the contexts in which we operate, email outreach remains a primary method for engaging potential supporters. From the very start, we were conscious of how important it is to consider our target
audiences and the overall effectiveness of an email campaign. Based on what we have learned from publishers, as well as our initial emails to potential supporters, we place a heavy emphasis on tailoring outreach approaches to our supporters. In our case, this has meant really understanding the world of university libraries and the particular priorities and struggles within university settings. This shapes the way in which we frame what the OBC is and can do for universities. Sometimes, in our emails, this can mean focusing on our values: how what we do supports OA and the broader scholarly ecosystem. However, we often also focus on the practicalities of library life. We know, for example, that for some libraries a real difficulty is making effective decisions about which OA initiative to potentially support and so focus on the OBC’s ability to reduce some of that burden of assessment. We also make sure to research the universities as much as we can before contacting them – so that in our emails we can, for example, acknowledge existing support for OA initiatives.

However, we also know that there is a limit to how effective tailoring general messaging to librarians can be. Librarians can receive a lot of unsolicited messages, sent to them in the hope of generating interest and support – whether for commercial publishing deals or for OA initiatives. In the case of OA initiatives, these emails typically come from publishers, authors, or advocacy groups and may contain information about new OA journals, conferences, or other resources related to OA. While some such emails may provide useful information, some do not – at least not to the librarian in question. As a result, librarians are often understandably cautious when responding to these messages and – if they do engage with them – will often carefully evaluate any offers or proposals that they receive.

When speaking to librarians and other OA outreach associates, we learned that institutions need information that is tailored as specifically as possible to their institution. Via our emails, we try to compile information that is directly relevant. A key way we do that is by using Thoth, the metadata management system for OA books developed under the remit of the COPIM project. It contains information from our publishers about their books. We use Thoth to share granular data with libraries about, for example, which authors from their institution have published in the collective catalogue of OBC members. For this, we use the Thoth ‘author affiliation’ metadata field. Other tailored information includes information on whether members of their university’s faculty serve on the advisory or editorial boards of our publishers/publishing service providers, or work as editors of publisher imprints. In the future, we are also keen to use Thoth data to highlight particular areas of subject relevance – in other words, concentrations of subject areas that are predominant in OA publications by authors at libraries’ universities.

Overall, this data-driven approach to outreach has the potential to help presses and libraries alike build stronger relationships between publishers and libraries by providing libraries with the information they need to support OA initiatives and by tailoring outreach efforts to the specific needs and interests of each institution. This can ultimately benefit both parties by increasing the visibility and impact of OA publications and supporting the goals of open scholarship.
Social media engagement with Open Access communities

The OBC’s presence on social media involved developing internal policies and procedures for content moderation, promoting transparency and accountability in the use of social media, and engaging with users and stakeholders to promote OA and create a positive and inclusive community.

Some of the risks and challenges of social media platforms are owned and controlled by private companies, which means that they are subject to their own terms of service, algorithms, and advertising policies. This can create issues for OA initiatives that rely on social media to reach their audience, as the algorithms may not always prioritize or promote OA content, and the advertising policies may restrict certain types of content from being promoted.2

At the beginning of the COPIM project, we evaluated a variety of social media platforms that our community was engaged with. It was quickly clear that Twitter would become the primary social media platform for conversations. We reserved the Twitter handle @OpenBookCollect in February 2022. We aimed to gather 100 followers in our first month. In fact, we gathered almost 500. Currently, we have around 990 followers.
We aim that our content on Twitter should loosely follow a rule of thirds. This means that roughly one-third of the output is comprised of original (created) material that promotes the platform and draws audiences to the
platform with a view to increasing membership. This might include, for example, notifications of blog posts or upcoming events, promoting the benefits of the platform, or welcoming new subscribers and making connections visible.

The second third should be ‘curated’ from the OA community and might include sharing new ideas and stories from OA advocates, the work and progress of collaborators, the successes of related ventures, or news on OA books.

The final third comes under the heading of “engagement,” and focuses on networking and building relationships within the OA community, including the broader COPIM project. This includes participation in public conversations, responding to comments, starting and participating in hashtagged discussions, and giving and soliciting opinions and feedback.

For the benefit of others working in this space, here are a few practices that we have implemented to engage OA communities on Twitter:

- In addition to OA hashtags (#OpenAccess, #OAbooks, #OpenMetadata, etc.), we regularly use #LibraryTwitter as a hashtag to engage library colleagues.
- Wherever possible, we provide accessible alternatives to align with accessibility standards. This includes alternative text for images and captions for videos. We use CamelCase for multiword hashtags, i.e. #OpenAccess, not #openaccess or #Openaccess. For specific instructions on accessible posting on different platforms, see https://www.rnib.org.uk/rnibconnect/technology/making-your-social-media-accessible
- We try to make good use of multimedia, especially video, and images, in curated material. Twitter’s analytic function routinely demonstrates that the use of images drives higher engagement.
- We don’t use, adapt or reshare any Copyrighted media whose rights are reserved. We use Openverse, the Free Media Library, and Creative Commons for media with a flexible range of sharing and remix/adaptation licenses. We always try our best to abide by the relevant license.

OBC has just hit its one-year anniversary on Twitter, and although we are excited about the community we have established, we are planning to establish a Mastodon channel soon, given the fallout from Twitter’s acquisition by Elon Musk. We have already seen many users in the OA community moving to Mastodon, among other new platforms, as an alternative to Twitter, including our sibling accounts of the COPIM project and Thoth. This often is due to concerns over the increasingly negative and toxic culture on Twitter, as well as other issues like privacy, data security, and censorship. Mastodon is a decentralized, open-source social media platform that allows users to create their own communities. We do not plan – in the near term at least – to fully leave Twitter, however. As has been noted, including by one of our co-founders, Eileen Joy: there is a politics to leaving Twitter, as much as there is to remain. From our perspective, alternative platforms do not and cannot wholly address the manifold issues that underlie the inevitably messy relations of social media engagement.
Working in partnership

The OBC’s outreach strategy demonstrates the value of tailoring outreach efforts to specific audiences and engaging with stakeholders in the OA community. By developing partnerships with libraries, research institutions, and other organizations, as well as advocating for OA policies and initiatives, we have started to make OA resources more widely available. We believe that our approach can serve as a model for other OA initiatives, particularly those seeking to engage with institutional stakeholders and encourage other organizations to explore similar outreach strategies to help promote access and equity in the OA landscape.

FURTHER READING


Banner Photo by Andrew Ruiz on Unsplash

Footnotes

0. Some of the myths about OA publishing include sub-sections on print, peer review, quality and prestige, book processing charges, third-party copyright, and plagiarism. There are ongoing projects to address myths such as the OA Book Network’s OA Mythbuster series. See e.g. [https://openaccessbooksnetwork.hcommons.org/2021/10/25/who-you-gonna-call-oa-mythbusters/](https://openaccessbooksnetwork.hcommons.org/2021/10/25/who-you-gonna-call-oa-mythbusters/)

0. List of workshops:
- https://copim.pubpub.org/pub/library-support-for-oa-books-workshop-the-german-perspective
- https://copim.pubpub.org/pub/library-support-for-oa-books-workshop-the-polish-perspective
- https://copim.pubpub.org/pub/library-support-for-oa-books-workshop-the-scandinavian-perspective
- Further research on EU Libraries (in collab with OPERAS): https://copim.pubpub.org/academic-libraries-and-open-access-books-in-europe-a-landscape-study
- https://copim.pubpub.org/pub/us-library-workshop/

0. These sources discuss the potential benefits and challenges of using social media for research and academic communication, including open access initiatives. They emphasize the importance of developing strategies for using social media effectively and critically to achieve the goals of open access and promote inclusivity and diversity in the academic community. ←

0. @copim@hcommons.social ←

0. @Thoth_metadata@hcommons.social ←