



# CHORUS

ANNUAL REPORT 2017

## MESSAGE FROM THE CHAIR OF THE BOARD

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2017 was a year of transformation that saw CHORUS transitioning from a start-up into an established solution for public access. We passed critical milestones last year, including taking a step toward financial independence as revenues outpaced expenses, expanding beyond US borders to serve international funding agencies, and successfully introducing new institutional dashboard services.

We intend to demonstrate that CHORUS delivers broad, networked public access while minimizing costs and effort for funders, researchers, academic institutions, and the public. Our goal is for funders to designate CHORUS as a full public-access compliance solution.

Now in our 4<sup>th</sup> year, CHORUS is an established partner with funding agencies in delivering public access. We are poised now to extend our services to academic institutions. Building on a foundation of ongoing engagement with funders, and now engagement with chief research officers and library leaders, we are gaining key perspectives to forge a path to sustainable, cost-effective, and transparent public access.



Susan King  
Executive Director, Rockefeller University Press  
Chair, CHORUS

## OUR MISSION

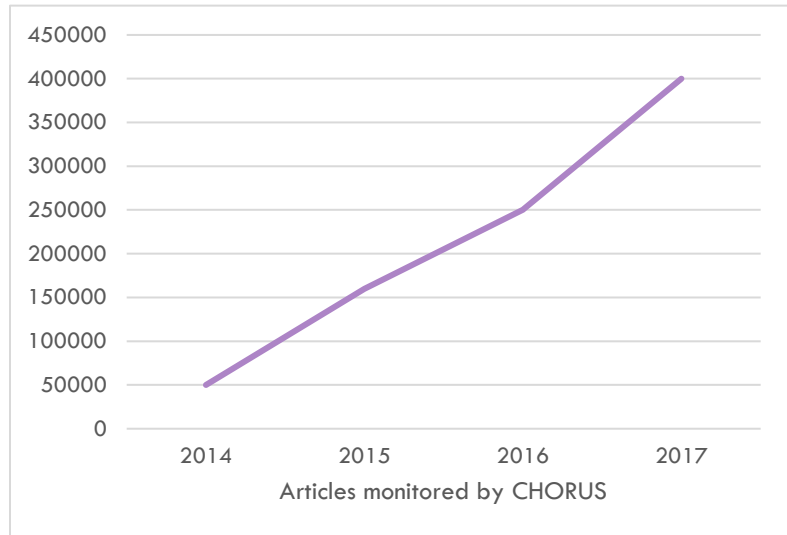
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*CHORUS is creating a future where the output flowing from funded research is easily and permanently discoverable, accessible and verifiable by anyone in the world. By providing the necessary metadata infrastructure and governance to enable a smooth, low-friction interface between funders, authors, institutions and publishers in a distributed network environment, CHORUS can minimize public access compliance burdens while increasing access to literature and data in support of funder mandates worldwide.*

## HARMONIZING PUBLIC ACCESS COMPLIANCE

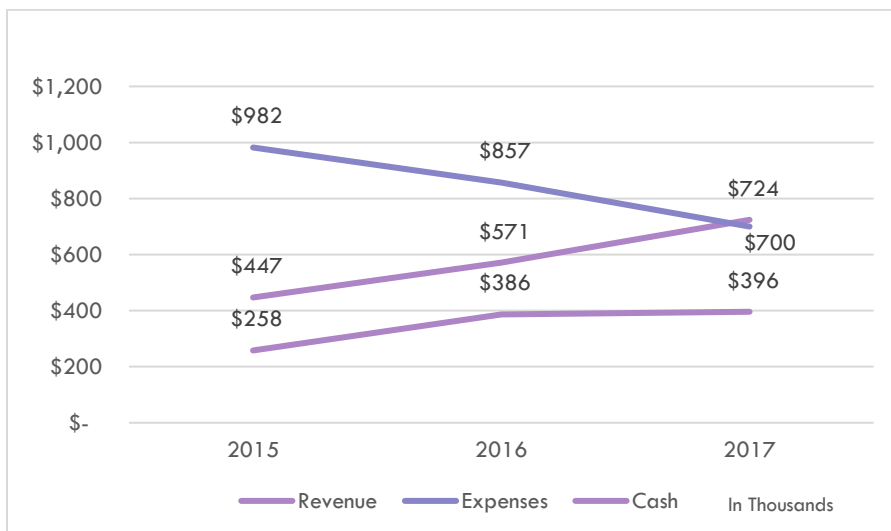
CHORUS serves as an information bridge, supporting agency search portals and leveraging publishers' existing infrastructure to facilitate a simple compliance process, optimized search and dashboard services, and multi-party archiving and preservation capabilities.

CHORUS is monitoring over 400,000 articles from member publishers. This number has been growing steadily, approaching 100,000 articles made publicly accessible on publishers' sites.



## FINANCIAL OVERVIEW

Reaching financial sustainability is a key goal for CHORUS, and in 2017 through careful management of expenses, our revenues exceeded costs for the first time. The majority of CHORUS' revenue comes from membership, with additional contributions from our new institutional and agency dashboard services to diversify our revenue streams and keep our membership fees flat for 2018.



## NEW SERVICES

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### Institution Dashboards

Aiming to ease the burden of monitoring compliance with funder mandates, CHORUS launched its new Institution Dashboard service at the Charleston Conference and the Yokohama Japan Library Fair after the successful completion of service pilots at both University of Florida and University of Denver. Chiba University and Johns Hopkins University became our first Institution Dashboard customers.

### Links to Agency Portals

CHORUS added direct linking to articles on agency portals including USDOE, NSF, USGS and most recently NLM's PubMed Central from all dashboards to help stakeholders with their compliance tracking.

### Links to Datasets

At the end of 2017 we turned on beta links at the article DOI level in our dashboards to datasets enabled by the SCHOLIX framework, part of an ICSU/RDA initiative.

## NEW AGENCIES

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### International Partners

JST (Japan Science and Technology Agency) signed an agreement to become CHORUS' first international agency partner after completion of a successful pilot with Chiba University in Japan.

Another international agency pilot was kicked off with the Australian Research Council along with La Trobe University and Deakin University, completing in February of 2018, serving as the foundation for a full production service launching later this year.

### US Funders

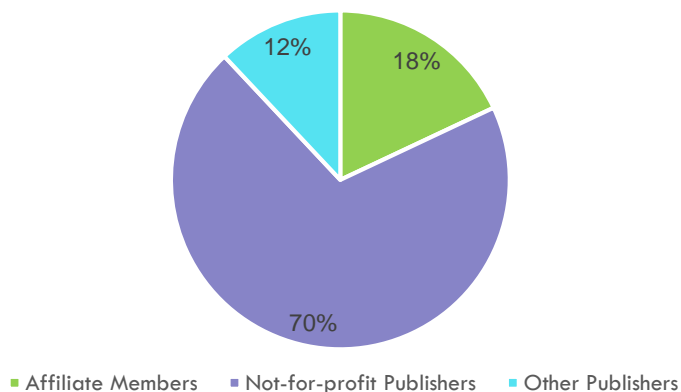
Intelligence Advanced Research Projects Activity (IARPA) of the Office of the Director of National Intelligence (ODNI) signed an agreement to employ CHORUS services to improve access, agency indexing, and long-term preservation associated with ODNI/IARPA-funded research.

## MEMBERSHIP OVERVIEW

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CHORUS membership is comprised of publishers, industry organizations and vendors that support the publishing enterprise. Our publisher members are diverse, representing scientific societies, commercial publishers and academic presses. They are both large and small, offering both open access and subscription models, and the majority are not-for-profits.

CHORUS Membership 2017



Four new members joined CHORUS in 2017:

- Royal Society of Chemistry
- New England Journal of Medicine/MMA
- eJournalPress
- GeoScienceWorld

Our Technical Working Group engages closely with existing members to assist with implementation and to help them make the most of their membership. As of November 2017, 73% of CHORUS members were fully implemented.

CHORUS members take long-term preservation seriously. Between 62-90% of member's monitored articles are being preserved in either the CLOCKSS or Portico archives.

## OUR TEAM

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### CHORUS BOARD MEMBERS, 2017

David Crotty, *Oxford University Press*

Scott Delman, *Association for Computing Machinery*, Treasurer

Fred Dylla, *AIP Publishing*

Thane Kerner, *Silverchair*

Susan King, *Rockefeller University Press*, Chair

Vincent Lizzi, *Taylor & Francis*

John Ochs, *American Chemical Society*

Howard Ratner, *CHORUS*

John Sack, *HighWire Press*

Matthew Salter, *American Physical Society*

Robert Harington, *American Mathematical Association*, Secretary

Andrew Tein, *Wiley*

Alexandra Vance, *GeoScience World*

Alicia Wise, *Elsevier*

Fran Zappulla, *IEEE*

Advisors:

Ed Pentz, *Crossref*

David Weinreich, *STM*

### CHORUS TEAM, December 2017

Howard Ratner, Executive Director

Tara Packer, Program Manager

Susan Pastore, Business Development Director



## Contact Us

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