CHORUS

ANNUAL REPORT 2018

MESSAGE FROM THE CHAIR OF THE BOARD

2018 saw CHORUS further consolidate our presence in the US with full participation agreements now in place with 9 US federal funding agencies – DOD, DOE, IARPA, NIST, NSF, Smithsonian, USAID, USDA and USGS – while continuing to grow our relationship with the Japan Science and Technology Agency. CHORUS commenced sales of the Institution Dashboard Service in 2018 enabling organizations to track research output by funder and by license and thus monitor compliance with funders' public access requirements of awardees. Going forward these services will help diversify CHORUS revenue streams, providing a path forward for the long-term sustainability of our organization. Over 80% of CHORUS publisher members have fully implemented CHORUS across the articles and journals they publish.

As head of a small publishing house, I can personally attest to the benefit of learning from Howard Ratner and the CHORUS team and members how to implement CHORUS efficiently and cost effectively. The evidence can be seen in the improvement in metadata associated with articles published in RUP journals, noted in an independent assessment of Crossref participation reports and this CHORUS success story.

After five years of the privilege and honor of serving as Chair, I elected to step down from this position effective February 2019. I'm delighted to pass the baton to my colleague, Michael Forster, elected unanimously by the board of Directors to serve as Chair effective 2019.

Susan King
Executive Director, Rockefeller University Press
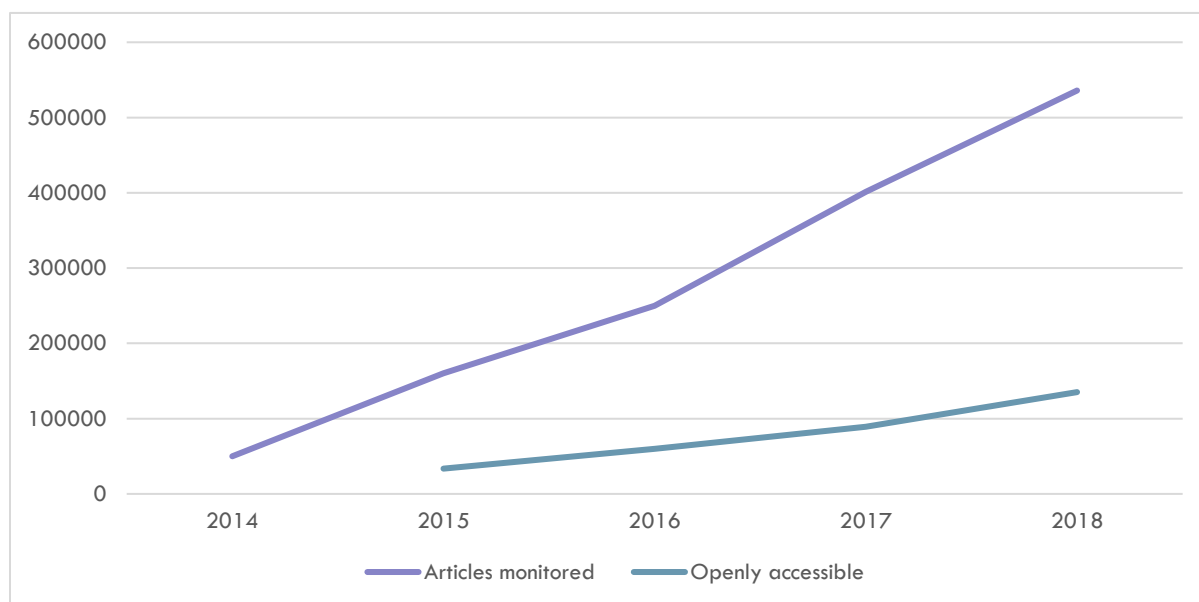*Chair*, CHORUS

OUR MISSION

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 open and 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 now monitoring over 535,000 articles from member publishers. This number has been growing steadily, with over 135,000 articles already made openly accessible on publishers' sites.
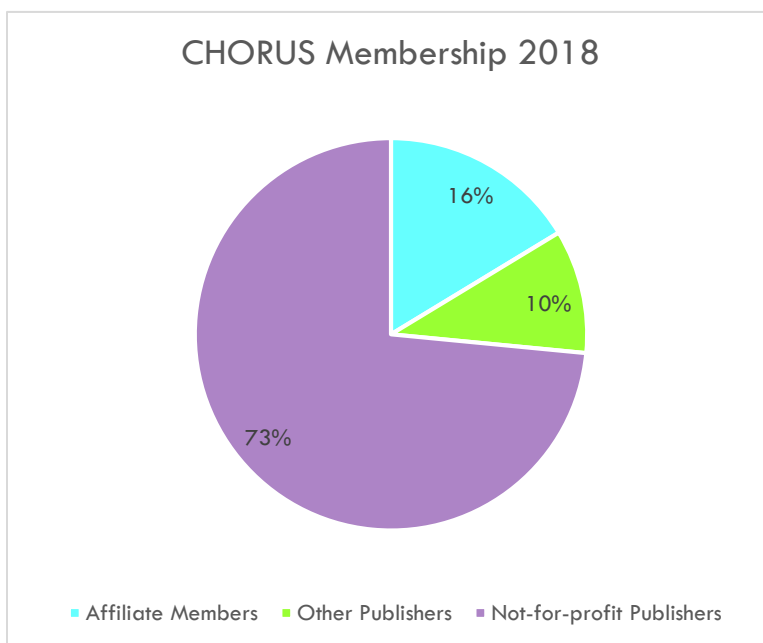
MEMBERSHIP OVERVIEW

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.

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 2018, 80% of CHORUS publisher members were fully implemented.

CHORUS members take long-term preservation seriously. Between 80-90% of member's monitored articles are being preserved in either the CLOCKSS or Portico archives.

CHORUS Membership 2018

- Affiliate Members 16%
- Other Publishers 10%
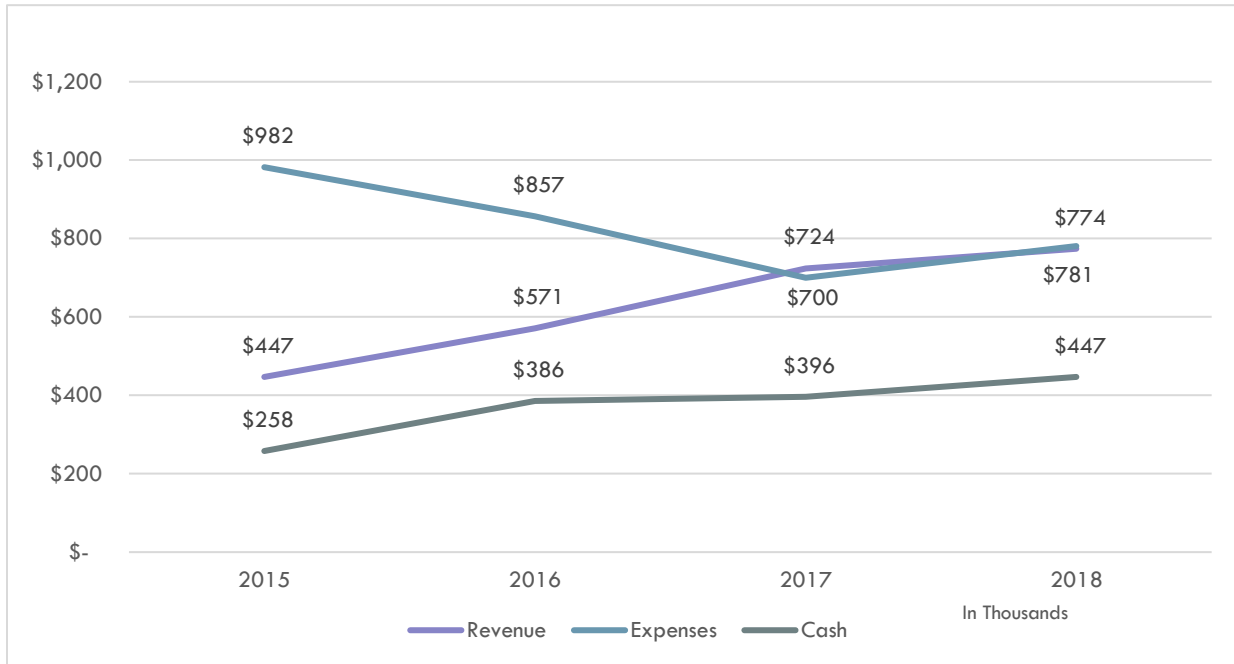- Not-for-profit Publishers 73%

FUNDING AGENCIES

CHORUS now provides comprehensive data and tracking information on the published research of 10 funding agencies. In 2018, USAID and USDA selected CHORUS as a solution to tracking and driving compliance with their public access policies, and NIST upgraded from a memorandum of understanding to a full agency participation agreement. CHORUS publisher members have an obligation to identify articles reporting on funded research and are obligated to make either accepted manuscripts or version of records of these identified articles open after an embargo period or immediately according to their license terms.

FINANCIAL OVERVIEW

Reaching financial sustainability is a key goal for CHORUS, and in 2018 our expenses and revenues were within $10k of each other while expanding our portfolio of services. The majority of CHORUS' revenue comes from membership, with additional contributions from our new institutional and agency dashboard services to diversify revenue streams.

NEW INSTITUTIONAL SUBSCRIBERS

Aiming to ease the burden of monitoring compliance with funder mandates, CHORUS expanded its Institution Dashboard service. Chiba University and Johns Hopkins University were our first Institution Dashboard customers followed soon after by University of Denver and University of Florida, with many more to come in 2019.

2018 ACHIEVEMENTS

Links to Datasets

CHORUS expanded its beta linking program to datasets at the article DOI. This linking is enabled by the Scholix framework (an ICSU/RDA initiative) using ScholixExplorer from OpenAire. A wide range of dataset repositories are included -- such as Dryad, figshare, Cambridge Crystallographic Data Centre, The Binding Database, various academic institution repositories, etc. There are nearly 100,000 links to datasets as of this writing.

More Links to More Metadata

Reuse Licenses: CHORUS linked reuse license types to the license information pages on the publisher's site.

Grants: CHORUS linked grant ids to the grant information page on the agency portals of the dashboards.

Providing links to this metadata delivers a means to easily navigate to the associated metadata in additional locations.

New Publisher Resources

Publisher Summary Reports: CHORUS introduced Publisher Summary Reports to provide publisher members with updates about relevant records in the CHORUS database.

Please make sure you have signed up to receive these reports by sending a request to support@chorusaccess.org

Funder Participant Page: CHORUS redesigned the Funder Participant Page to provide publisher members with a readily available source to manage their CHORUS funder participant obligations.

OUR TEAM

CHORUS BOARD MEMBERS, 2018

David Crotty, *Oxford University Press*

Scott Delman, *Association for Computing Machinery*, Treasurer

Fred Dylla, *AIP Publishing*

Michael Forster, *IEEE*

Ann Gabriel, *Elsevier*

Jonathan Glover, *Wiley*

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 Society,* Secretary

Alexandra Vance, *GeoScienceWorld*

Advisors:

Ed Pentz, Crossref

David Weinreich, STM

CHORUS TEAM, December 2018

Howard Ratner, Executive Director

Janice Kuta, Business Development

Tara Packer, Program Management

Mark Robertson, Asia-Pacific Development

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