



CHORUS

ANNUAL REPORT 2019

MESSAGE FROM THE EXECUTIVE DIRECTOR

As I sit writing these notes in the safety of my home office, I wonder how the world will emerge from this COVID-19 global pandemic crisis. CHORUS has been a virtual organization since its inception in 2013. Our staff and board are all very acclimated to using Zoom for meetings, and we just finished conducting our first online-only Annual Business Meeting on May 1, 2020. Nonetheless, we look forward to meeting you all in person again and learning how we can best help you meet your open access goals.

2019 was a year of steady growth for CHORUS across many areas. NOAA joined as a full participating agency -- adding to our agreements with 9 other US federal funding agencies. With the help of the Japan Science and Technology Agency, we brought in numerous institutions as new dashboard subscribers to track their research output by funder and by license to help them monitor compliance with funders' open access requirements of awardees.

CHORUS completed the first phase of expanding our metadata coverage to include all publishers worldwide and some additional global funders. We expanded coverage of dataset metadata linking to the articles that CHORUS monitors and can issue reports on demand that have much more detail about the linked datasets. CHORUS staff attended numerous meetings on enabling open and FAIR data in 2019.

Initial explorations were done regarding automating content deposits and identifying preprints reporting on agency funded research. Both projects have considerable potential in the coming year.

I would like to give a heartfelt thank you to all of our volunteers who serve on committees, working groups and task forces throughout the year. I would also like to thank the work done by our former chair Michael Forster (retired in March 2020), interim chair Scott Delman, and the Board of Directors who have all served CHORUS well in 2019. I look forward to working with Alix Vance in her new role as our Board Chair effective May 1, 2020.

Stay safe and stay in touch!



Howard Ratner
Executive Director, CHORUS

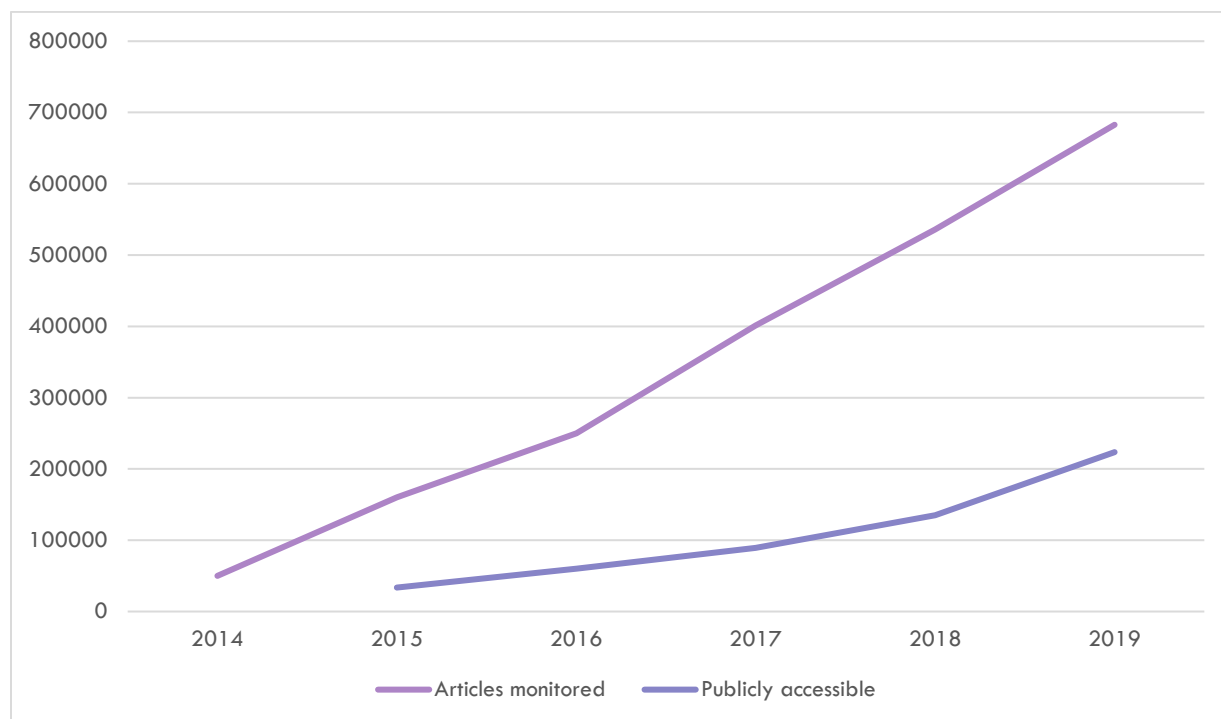
OUR MISSION

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

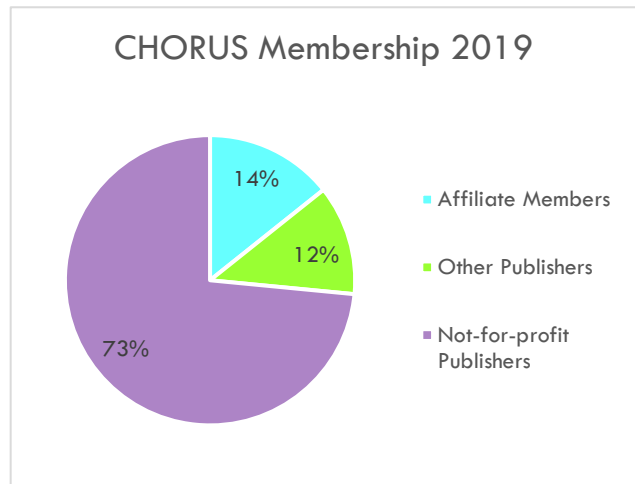
CHORUS serves as an information bridge, supporting agency search portals and leveraging publishers' existing infrastructure to facilitate a simple compliance process, optimized search and dashboard services, and multi-party archiving and preservation capabilities.

CHORUS is now monitoring over 682,000 articles from member publishers as of December 31, 2019. This number has been growing steadily, with over 223,000 articles already made openly accessible on publishers' sites.

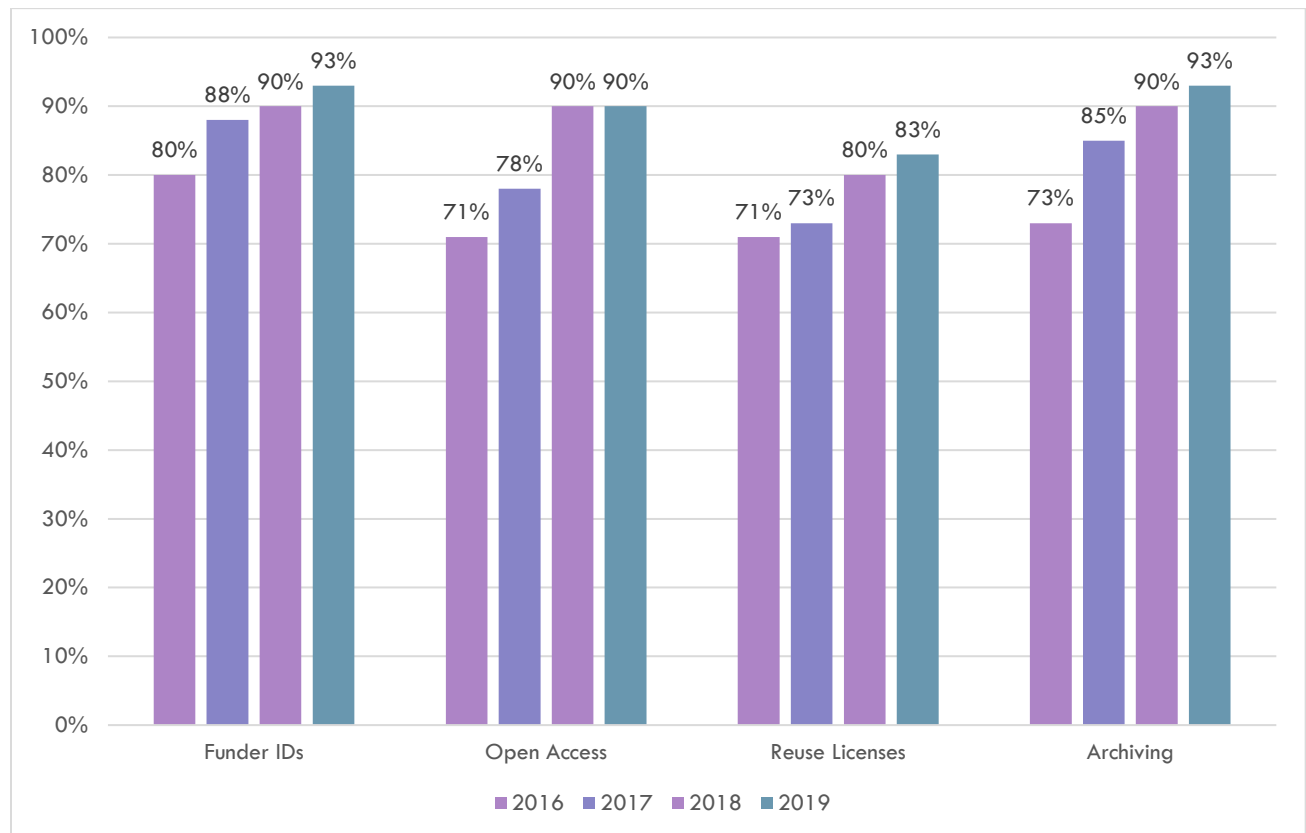


MEMBERSHIP OVERVIEW

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. The table below highlights the progress of our publisher members over the past four years toward meeting their implementation goals.

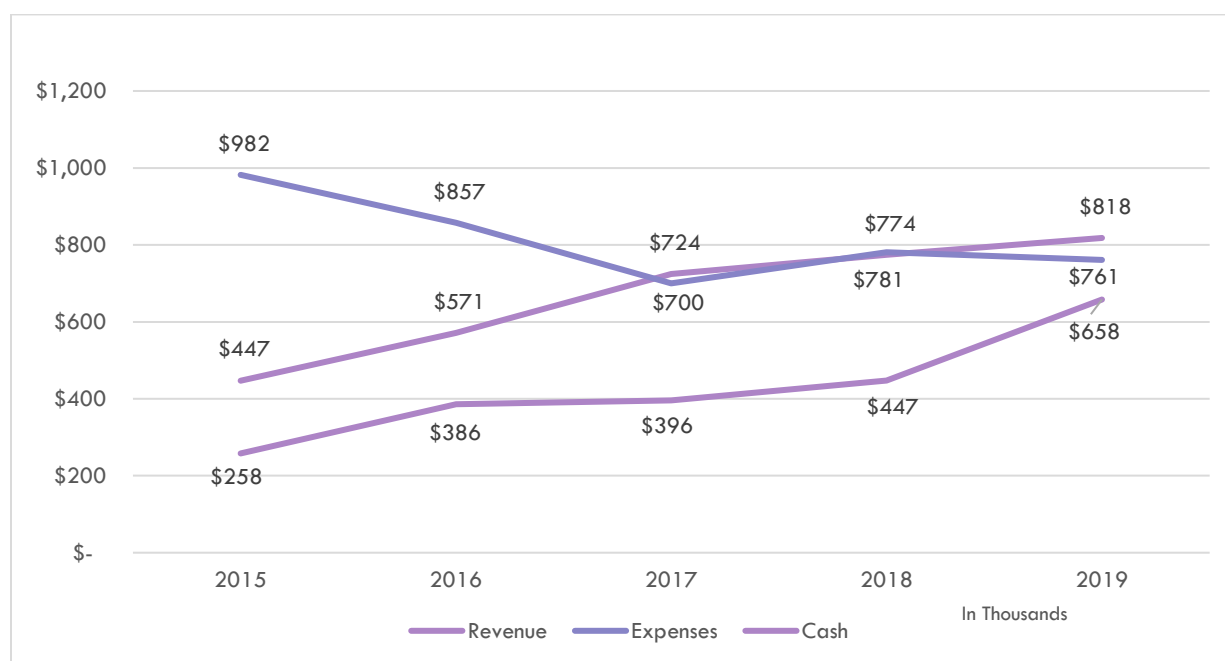


FUNDING AGENCIES

CHORUS now provides comprehensive data and tracking information on the published research of 11 funding agencies. In 2019, NOAA joined the collection of agencies who have selected CHORUS as a solution to tracking and driving compliance with their public access policies. 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 2019 our revenues exceeded our expenses. The majority of CHORUS' revenue comes from membership, with additional contributions from our new institutional and agency dashboard services to diversify revenue streams.



INSTITUTIONAL DASHBOARD SERVICE

Eight Academic and Research Institutions in the US and Japan subscribe to the CHORUS Institution Dashboard service in 2019 to help them track faculty output and open access compliance for content and datasets reporting on funded research.

2019 ACHIEVEMENTS

Expanded Metadata

CHORUS expanded coverage of dataset metadata that links to the articles we monitor. On demand reports are available for funders and publisher members that include the types of data, the dataset creator, and the names of the repositories where the data are stored.

Enhanced Dashboards

The CHORUS Dashboard Service in 2019 includes all DOI records that have Funder IDs for all publishers in Crossref. In 2020, we now include all DOI records that have Funder IDs matching all funders worldwide. This major enhancement provides a more comprehensive and discoverable set of article records and data that allows CHORUS publisher members, participating institutions, and funding agencies to further analyze open access funding sources and published output.

Formation of the Academic Advisory Working Group

CHORUS formed an Academic Advisory Working Group (AAWG), co-chaired by Rick Anderson from University of Utah and Judith Russell from University of Florida, to expand institutional engagement and develop capabilities beyond CHORUS' current applications. The AAWG conducted a series of interviews with librarians about their needs and requirements for monitoring compliance and the systems they use.

Revised Publisher Implementation Guide

The Technical Working Group, led by Evan Owens and Mark Doyle, released an updated version of the CHORUS Publisher Implementation Guide.

CHORUS Success Stories

The Communications Working Group developed a set of case studies to show how CHORUS has helped evolve members' missions and is a solution for monitoring open access to funded research that works for publishers of all sizes. Additional success stories illustrate how institutions are using CHORUS dashboard data, tools, and reporting to save time and resources.

- University of Florida Saves Time and Resources with CHORUS
- Chiba University Brings Kaizen to CHORUS
- American Physical Society: Mission Possible
- University of Denver: The Resourceful Librarians

OUR TEAM

CHORUS BOARD MEMBERS, 2019

Rick Anderson, *University of Utah*

David Crotty, *Oxford University Press*

Scott Delman, *Association for Computing Machinery, Treasurer*

Michael Forster, *IEEE, Chair (retired March 2020)*

Ann Gabriel, *Elsevier*

Sara Girard, *AIP Publishing*

Jonathan Glover, *Wiley*

Thane Kerner, *Silverchair*

Susan King, *Rockefeller University Press*

Vincent Lizzi, *Taylor & Francis*

John Ochs, *American Chemical Society*

Howard Ratner, *CHORUS*

Judith Russell, *University of Florida*

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

Howard Ratner, *Executive Director*

Tara Packer, *Program Management*

Mark Robertson, *Asia-Pacific Development*



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