# Annex 4a - Jisc Monitor Overview

## Project summary

HEFCE policy will mandate open access availability for outputs accepted for publication after 1 April 2016 and submitted to the post -2014 REF. HEI will expect Jisc to put systems in place to support them in meeting policy requirements. They are likely to need support in monitoring publication output and reporting on compliance with OA policies.

Jisc Monitor, a one-year project starting in May 2014, will explore how a Jisc managed shared service might support institutions in meeting HEFCE policy. The project will scope and build proof of concept prototypes to respond to specific use cases. Prototypes will be used to assess the feasibility of developing a service, to scope that service if there is a clearly articulated need for one and to identify priorities for the service.

Jisc Monitor will engage key stakeholders and encourage their participation and collaboration to explore design and development of a service for HEI.

## Use cases

Each of the use cases will be supported by an exploration of the standards and protocols enabling efficient data exchange.

## Benefits and value

Potential benefits of Jisc Monitor include:

* Reducing the risk of non-compliance with funder OA policies
* Saving research managers and librarians time
* Encouraging development of and adherence to global standards resulting in benefits for librarians, repository and research managers, publishers, research councils and funders

## Project deliverables

By April 2015 it is expected that project deliverables will include:

1. Functioning prototypes mapped to high-level use cases
2. The prototypes must be supported by robust user feedback together with a critical assessment of the opportunities, challenges and dependencies that are likely to impact development of service components
3. Recommendations for further development of service components, if appropriate. This will include a rationale, assessment of need, likely impacts and activities required to develop service components. It should also position the service components in context by including a critical evaluation and assessment of related services and initiatives
4. Each of the prototypes must and released as free and open source software by April 2015.

## Development team

* Mimas has been awarded a grant to develop Jisc Monitor. Mimas will utilize the skills and expertise of project partners Sero Consulting, Cottage Labs and Knowledge Integration.
* Jo Lambert is project manager
* Brian Mitchell is technical lead

# Context

The rationale for Jisc Monitor is a direct consequence of the Jisc APC pilot project with the research outputs of Jisc APC influencing Jisc Monitor. Following the Finch report and the RCUK-funded mandate, Jisc Collections felt that it was important to trial a solution for the management of APCs as quickly as possible. In response to this the Jisc APC pilot aimed to engage institutions, funders, publishers and intermediaries to research key issues and challenges, whilst also providing an online administration platform for a selection of pilot institutions.

The research activities of the project have provided some valuable insights into the issues surrounding the management of APCs and the role of an intermediary service and these are being made available as a series of case studies and best practice guidelines by July 2014. In reflecting on some of the challenges experienced by institutions in managing open access publication activity, there are a broad range of areas that people would like support with. These include monitoring all publication activity, clarifying details for compliance with funder mandates (which includes reporting), monitoring spend (publication charges), and avoiding duplication of effort by enabling systems’ interoperability and collaboration on standards development. Jisc Monitor aims to respond to this broader set of requirements.

# Questions for SCAG

The development team would appreciate advice and comments on the following:

1. Where do you think that Jisc Monitor has potential to provide most value?
2. What are the opportunities and the risks for Jisc Monitor?
3. What other related projects/initiatives could/should Jisc Monitor interact with?
4. What are the challenges for organisations with reference to the use cases and do you have particular recommendations for capturing and collating this information?
5. Do you have any other comments or recommendations on the approach taken to project development?