

If you read nothing else, read this!

- **Benefits to the publisher**
- **Benefits to library investors (members)**
- **How to Launch OtF in 10 Easy Steps**

This toolkit is a step-by-step guide aimed at small to medium-sized scholarly publishers that have a backlist of ‘closed’ books, but who are interested in moving towards open access. If they have no mechanism for doing so, then the Opening the Future (OtF) model might be an option and this guide will show you how.

Benefits to the publisher

- The model does not rely on one-off costly Book Processing Charges to pay to flip one book at a time.
- It is based on simple collective library investment: lots of small payments are pooled to cover frontlist publishing costs, meaning no library bears a disproportionate burden and the publisher is able to fund its OA activities.
- The OtF model doesn’t require a lot of resources to run it.
- And it is quite low risk because the publisher doesn’t have to invest a lot of time or content upfront.

Benefits to library investors (members)

- Library members get perpetual access to specially curated closed backlist books at a special price.
- Their investment pays for this access but goes into a collective pool which combines to fund new frontlist books in OA format.
- So for a modest fee libraries can enrich their local collections while simultaneously funding new OA books.

The OtF toolkit on the Copim Compass walks you through the process for setting up the Opening the Future OA book revenue model at your press. It is a comprehensive and detailed guide but the model is simple. In fact, the steps below tell you what you need to do in order to implement it. You can just follow those and read nothing else, or you can delve into more detail in the rest of the guide.

How to Launch OtF in 10 Easy Steps

1. Create a package of 40-50 backlist books on a similar theme (or create several of around that many books in each!). Think about what might appeal to libraries e.g. UN SDG goals and price it based on what might be appealing to libraries while still covering your costs.
 - For information on the rationale and scale, see [Section 7 'Assumptions'](#).
2. Host this backlist package somewhere known and trusted by libraries (e.g. Project MUSE).
 - For hosting options see [Section 8 'Organisational partnerships'](#).
3. Create a short description of your offering and host it on a subscription manager (e.g. Jisc, Lyris through an agreement) or host it yourselves with a sign-up form to your finance person/department.
 - For connections with Lyris & Jisc see [Section 8 'Organisational partnerships'](#).
4. Create a web page which contains the description of your offering, details of the backlist package(s) on offer, the pricing, and a link to where libraries can sign up.
 - For details on the sign up process see [Section 8 'logistics and workflows'](#).
5. Do comms, marketing and outreach to libraries that specialise in the subject of your backlist package, and/or libraries that support other OA initiatives.
 - For outreach templates see [Section 8 'Author and library outreach'](#).
6. Keep track, e.g. using spreadsheets, of who signed up and when, so you know who your advocates are. You also need to track when their renewals are due after 3 years and when their access to the backlist becomes perpetual.
7. Use the funds from these backlist subscriptions to fund your OA frontlist in the same subject area as the backlist package, and be very transparent to investor libraries about where their money is going.
 - For info on the OA pipeline see [Section 8 Further logistics and workflows](#).
8. Create a mailing list of library supporters and keep them informed of your progress in opening up your frontlist.
 - For marketing suggestions see [Section 8 'marketing'](#).
9. When it comes to renewals, create a new backlist package and/or a supporter package without backlist content and reach out to your supporters about it.
 - For information on managing renewals and ongoing membership see [Section 8 'renewals'](#).
10. Consider engaging your library investor members in an advisory capacity on a formal Board, but at the very least keep talking to them: keep them up-to-date on books they have funded, keep listening to what they need, what they can afford, what their pressures are, the policy and wider HE landscapes, and what your opportunities to tweak the model

might be.

You can just follow those steps and launch OtF without reading any further, but you will find the rest of the toolkit useful to dip in and out of for more detail.

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