CHORUS

ANNUAL REPORT 2023

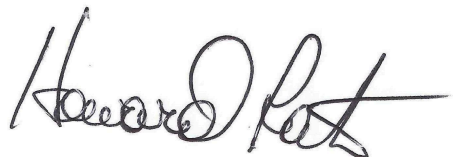# MESSAGE FROM THE EXECUTIVE DIRECTOR

Greetings to CHORUS Members, Partners, and Friends,

Over the last year CHORUS Board and Staff have focused on making open research work! Quality metadata and stakeholder collaboration are crucial for the evolution of open access of scholarly content and data. Our efforts in 2023 focused on key areas of community advancement to support our stakeholders, including:

- Adding 1,069,811 new publication records to CHORUS, an increase of 20% compared to prior year's figure

- Partnering with CSIRO, publisher members, and other leading industry organizations to help identify and track research resources

- Partnering with Metadata Game Changers to evaluate metadata quality

- Expanding our preprint service to identify funded research and connections to published research

- Welcoming new members, building new integrations, adding new features and reporting

- Convening a series of six successful forums with cross-industry stakeholders to increase awareness, engage dialogue, identify shared concerns and opportunities, and promote industry collaboration that will advance metadata infrastructure needs

As we celebrate our 10th anniversary, we reflect on our journey and the impact we've made in enabling open research. Looking forward, we are excited to continue our work and build on the successes of previous years. We invite you to continue to explore and join us in investigating the many opportunities surrounding our industry to make open research work. CHORUS continues its mission to enable, support, and improve the infrastructure of open research for the benefit of society. In this spirit, we thank CHORUS members and partners for their ongoing collaborative support and look forward to the new partnerships and initiatives ahead.

Thank you for your continued support!!

Howard Ratner
Executive Director, *CHORUS*

OUR MISSION

CHORUS is creating a future where the output 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.

MAKING OPEN RESEARCH WORK

CHORUS connects funders, publishers, institutions, and the public from across the open research ecosystem to share knowledge, develop solutions, advance innovation, and support collective efforts.

WHAT WE DO

- Provide trusted information about the outputs of funded research
- Help funders, institutions, publishers, and the public see, find, and understand the status of the outputs of funded research
- Identify research outputs that are easily and permanently discoverable and accessible by anyone in the world
- Minimize compliance burdens for researchers, institutions, funders, and publishers
- Deliver optimized search and dashboard services for monitoring and compliance

HOW WE DO IT

Collect information about published articles and data that report on funded research, and provide visualization tools to help users understand these outputs related to funded research.

Use open technologies to optimize content discovery, long-term accessibility, funder identification, compliance monitoring, and dashboard reporting.

Offer interoperability with other public-access delivery solutions, agency search portals, publisher platforms, and scholarly repositories and archives.

2023 ACHIEVEMENTS

Scaling OA Compliance
- Launched live implementations of preprint dashboard and reporting service for ChemRxiv and TechRxiv
- Developed arXiv preprint dashboard and reporting service prototype using Astrophysics Data System (ADS) metadata
- Initiated evaluations of improved open workflow for full-text harvesting
- Added new publisher members
- Upgraded to Google Analytics 4

Developing Data Metrics
- Added Data Management Plans to CHORUS Funder Plan Indices
- Integrated OA Switchboard metadata
- Analyzed National Science Foundation, U.S. Geological Survey and U.S. Agency for International Development dataset metadata metrics via the INFORMATE project (Funded by the U.S. National Science Foundation, award 2134956)

Improving Metadata Quality
- Launched Research Resources pilot with CSIRO, member publishers and industry partners
- Added Japan Linking Center (JaLC) DOIs to CHORUS database
- Added Research Organization Registry (RoR) IDs to CHORUS database
- Analyzed and identified gaps in metadata coverage for member publishers and funder participants
- Monitored CHORUS Data Availability Policies Index and CHORUS Software Citation Policies Index
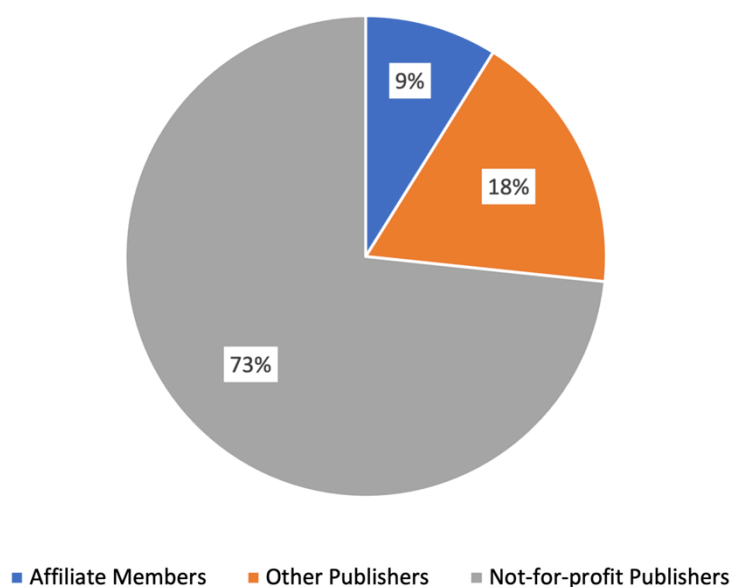
Connecting Stakeholders
- Convened six successful forums with cross-industry stakeholders to increase awareness, engage dialogue, identify shared concerns and opportunities, while promoting industry collaboration to advance data infrastructure and value metrics to improve metadata
- Conducted regular meetings with CHORUS working groups and stakeholders
- Performed market research to ensure value of CHORUS services
- Engaged with our community through presentations by staff to help them understand compliance and metadata issues related to funded research

CHORUS COMMUNITY

Membership

CHORUS membership is composed of publishers, industry organizations and vendors that support the publishing enterprise. Our publisher members represent a diverse array of organizations, including scientific societies, commercial publishers, and academic presses. They vary in size and structure and offer a mix of open access and subscription models, with the majority being nonprofit entities.

CHORUS Membership 2023

- ■ Affiliate Members   ■ Other Publishers   ■ Not-for-profit Publishers
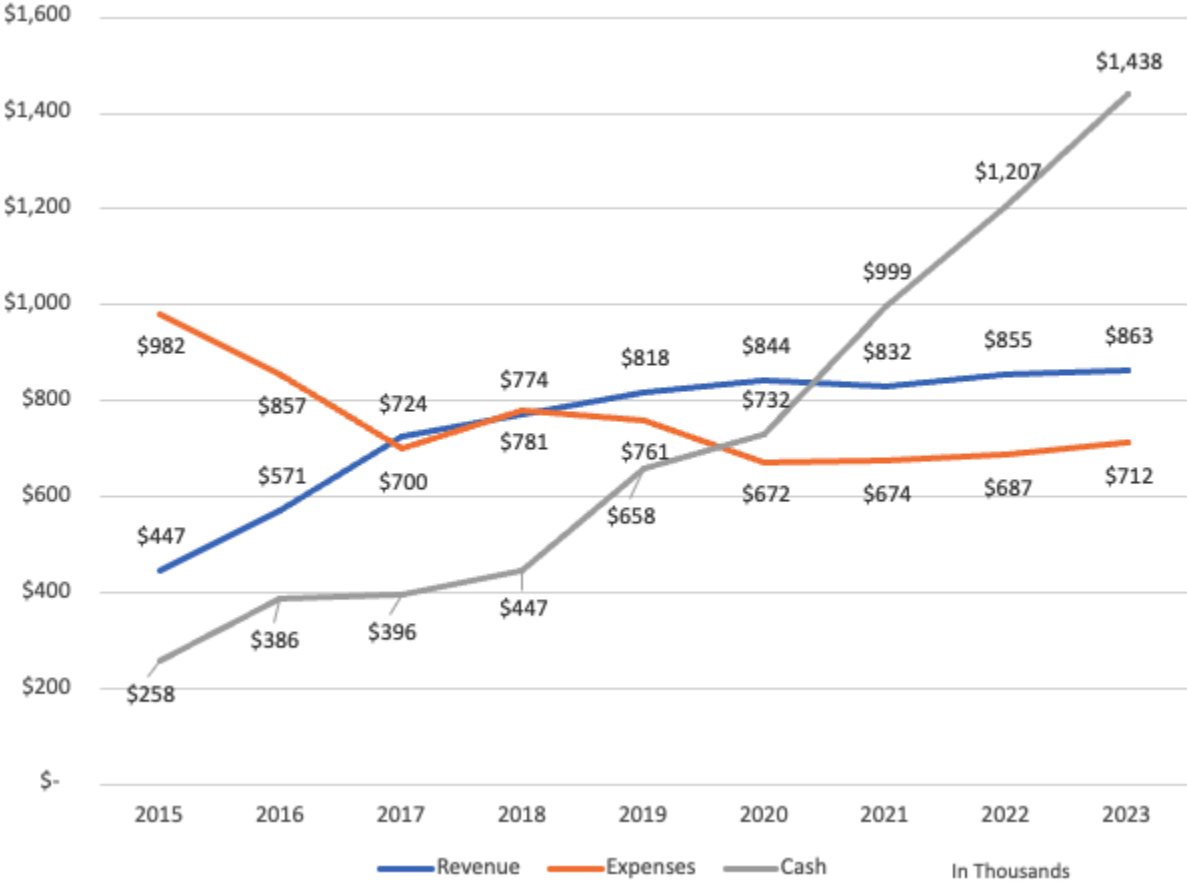
Funding Agencies

CHORUS provides comprehensive data and tracking information on articles and data reporting on the research funded by agencies worldwide. CHORUS publisher members have an obligation to identify articles reporting on funded research from CHORUS funding agency partners and are obligated to make either accepted manuscripts or version of records of these identified articles openly accessible immediately or after an embargo period according to the member's license terms. Funding agencies have an obligation to link to the openly accessible articles on the publishers' sites.

Institutional Subscribers

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

FINANCIAL OVERVIEW

The majority of CHORUS' revenue comes from membership. Additional contributions from our institutional and agency dashboard services, forum sponsorships, and grant awards help to diversify revenue streams.

CHORUS BOARD OF DIRECTORS, DECEMBER 2023

Alix Vance, AIP Publishing (Chair)

John Ochs, American Chemical Society (Treasurer)

Jenny Peng, Oxford University Press (Secretary)

Andrew Bostjancic, Taylor & Francis

Nick Campbell, Springer Nature

Michael Cairns, American Psychological Association

Scott Delman, Association for Computing Machinery

Mark Doyle, American Physical Society

Ann Gabriel, Elsevier

Jonathan Glover, Wiley

Robert Harington, American Mathematical Society

Michael Levine-Clark, University of Denver

Dawn Melley, Institute of Electrical and Electronics Engineers

Judith Russell, University of Florida, Gainesville

Will Schweitzer, Silverchair Science + Communications

Christopher Straub, GeoScienceWorld

Diane Sullenberger, Proceedings of the National Academy of Sciences

CHORUS STAFF

Howard Ratner, Executive Director & Ex-officio Board Director

Tara Packer, Program Management

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