

Fund Policies



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[Services » Faculty Support » Open Access](#)

Open Access Authors Fund FAQ

- 1. Are there any limits to the article processing charge (APC) amount that can be requested?**

The fund is limited to a maximum of \$2,500.00 USD per article. The cap has been put in order to ensure that funding is available to more open access authors. Despite the decline in value of the Canadian dollar, Libraries and Cultural Resources is committed to ensuring that scholars and disciplines across the University have access to support for publishing in open access journals.
- 2. Are there any limits to the number of times an author can submit to the Open Access Authors Fund?**

Authors are limited to two successful applications per fiscal year (April 1 – March 31).
- 3. Why limit support to journals that are listed in the Directory of Open Access Journals?**

Journals listed in the [Directory of Open Access Journals](#) are committed to transparency and best practice in scholarly open access publishing. The fund will consider funding in start up Canadian open access journals, that have not yet had a chance register in the directory.
- 3. Can the OA Authors Fund be used to cover formats other than journal articles that are openly accessible, such as conference presentations and monographs?**

The Fund has mostly covered journal articles but it has paid APCs for monograph chapters a few times. Libraries and Cultural Resources (LCR) is interested in hearing from authors who have support needs for OA content in formats other than journals. Please contact the [Digital Initiatives and Scholarly Communication Librarian](#).
- 4. Are other charges, such as illustration and colour fees, covered by the fund?**

Some publishers of OA content do not charge extra fees, nor do they incorporate them into OA fees. Others charge both as two distinct amounts. Because the fund is designed to cover OA fees alone and because double charging by publishers is discouraged, the Open Access Authors Fund will not support those publishers who charge extra fees. The OA fee will be paid; any other charges will not.
- 5. Why are hybrid OA journals excluded?**

Hybrid journals were covered by the Open Access Authors Fund for the first several years of the Fund, where the publisher stated that they were reducing subscription costs in response to the take-up of their hybrid OA programs. The problem is that there is insufficient evidence that publishers are actually doing this.

As well, hybrid OA journals were initially thought of as a short-term measure that would allow publishers to ease into a fully OA environment. This has not really happened; there is an increasing number of hybrid OA titles, often featuring charges that are more expensive than for fully OA journals.
- 6. Do funded authors need to place their article in the University of Calgary institutional repository (IR)?**

Yes, if possible. In the first several years of the Fund, deposition in the institutional repository was an option, one that almost all authors selected. Because of this wide acceptance, this was made a required element of the funding process, bringing the Calgary fund in line with OA funds at other institutions. For more information about the institutional repository, please contact the [Digital Initiatives and Scholarly Communication Librarian](#).
- 7. Do University of Calgary authors need to exhaust other funding sources that can be used to pay for submission fees before applying to the Open Access Authors Fund?**

Yes. Applicants must exhaust other funding sources (in most cases, grants) before applying. This is common to every open access fund worldwide. If an author has no grant money or the grant money is all gone or the grant money is all allocated or the funder does not allow monies to be used for publication costs, then the Open Access Authors Fund is available.
- 8. Will the Fund do reimbursements for already-paid article processing charges?**

The preferred method is invoice payment by LCR on behalf of authors. Reimbursements bring more paperwork for all involved and can take up to two months to occur, during which time authors have to cover potentially large APC charges themselves. On occasion, however, reimbursements are allowed. Reimbursements need to be approved by the [Digital Initiatives and Scholarly Communication Librarian](#) or their designate and must meet the [criteria](#) for the Open Access Authors Fund.
- 9. Where can I learn more about Creative Commons (CC) licenses?**

Creative Commons licenses are frequently associated with open access content. There are six main licenses, ranging from the most liberal, CC BY, the the most conservative, CC BY-NC-ND. There are good descriptions of the licenses at the [Creative Commons site](#). The [CC license page](#) from Wikipedia is also informative.

UNIVERSITY OF CALGARY LIBRARIES AND CULTURAL RESOURCES

Open Access Authors Fund FAQ

<http://library.ucalgary.ca/open-access-authors-fund-faq>

10. What is a predatory journal and where can I learn more?

Predatory publishers are those that lack discernible scholarship, academic rigour or credibility. They use aggressive practices to recruit authors and editors. You can find more information from the [ThinkCheckSubmit](#) website. If you have any doubts about the credibility of a journal, please talk to your colleagues or consult with the [Digital Initiatives and Scholarly Communication Librarian](#).

Back to the [Open Access Authors Fund](#).

For more information, please contact:

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Digital Initiatives and Scholarly Communication Librarian
University of Calgary | Taylor Family Digital Library | 2500 University Drive | Calgary AB T2N 1N4
christie.hurrell@ucalgary.ca
403-210-6103

Libraries & Cultural Resources

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Cornell University
Library

COAP Funding

The COAP program has been funded again for the 2016-17 academic year and we are accepting applications for reimbursement of eligible publishing and processing charges. Please note that we have made a few changes to the scope and criteria of the program for the new academic year.

The Cornell Open-Access Publication Fund will underwrite reasonable processing fees for open access publications by Cornell authors when funds are not otherwise available. The fund is supported jointly by the Provost and the Cornell University Library.

Reimbursement for processing fees that conform to the requirements below may be requested using this form.

Requirements

Eligible Authors: The COAP Fund is available to any faculty member, post-doctoral researcher, staff member, or student author affiliated with Cornell's Ithaca campus.

Eligible Publication Types: COAP funds apply to publication and processing fees for scholarly, peer-reviewed articles, book chapters, and books.

Eligible Publication Venues: COAP funds may be used to pay processing fees associated with publishing peer-reviewed scholarship on an open access basis. Eligible open access publishers may operate on a not-for-profit or a commercial basis, but the entire publication where the COAP-supported work appears must be freely available online, with no charge to readers or readers' institutions for access.

Journals

- To be eligible, a journal must meet these additional requirements:
- Listed in the Directory of Open Access Journals.
- Publisher is a member of the Open Access Scholarly Publishers Association or adheres to its Code of Conduct.
- Provides immediate, unfettered access to all peer-reviewed articles. In other words, journals with a hybrid open access model (some articles in the journal are open, some are not) or delayed open access model (articles become open after an embargo period) are not eligible.
- Has publicly available a standard article fee schedule.

- Has a policy to waive fees in case of economic hardship.

Books

Because the open access environment for books is still evolving, eligibility will be decided on a case-by-case basis. In general, books supported by COAP funds should be openly accessible immediately upon online publication. In the case of contributed chapters to a multi-author volume, the entire volume must be published on an open access basis in order for individual chapters to be considered for COAP funding.

No Alternate Funding Available: Articles, chapters, or books for which alternate publication funding is available are not eligible for COAP funds. This includes works whose underlying research was funded by grants or gifts that allow grant funds to be used for publishing and processing fees (regardless of whether such fees were included in the budget of the particular grant that supported the research). COAP funds are intended to support open access as a funding source of last resort.

Per-work Reimbursement Cap: The most that the COAP Fund will reimburse for a single article, chapter or book is \$3,000.

Per-Author Reimbursement Cap: An author may receive reimbursement for up to \$3,000 per year for all submission and publication charges. Unused amounts do not roll over to future years.

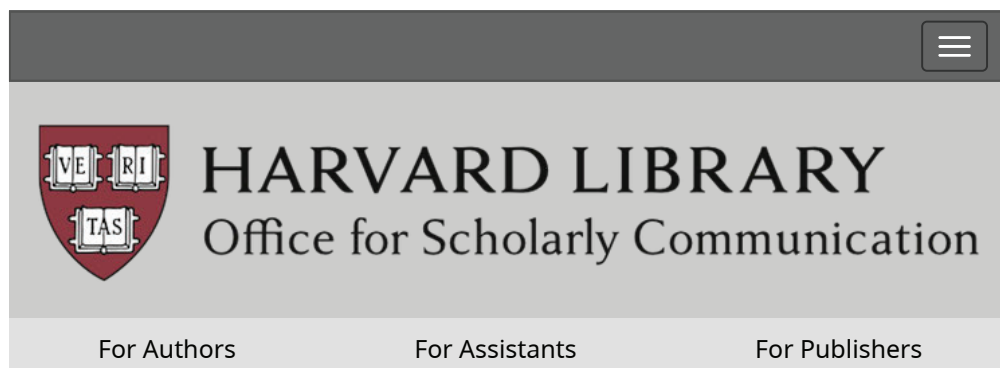
Multiple Authorship: In the case of an article, chapter or book with multiple authors, each author is responsible for a prorated portion of any publishing fees. For example, for an article with three authors that is to appear in a journal with a \$3,000 publication fee, each author is responsible for \$1,000 of that fee. If two of the authors are Cornellians, each may enter an application for \$1,000. If both apply, \$2,000 will be sent to the journal. If the journal has a \$6,000 publication fee, the \$3,000 per article cap will apply and each Cornell author may only apply for \$1,000.

Reimbursement Mechanism: Once a request has been approved, the author should forward a copy of the publisher's invoice to the COAP contact. The Library can either pay the publisher directly for the amount of the award or reimburse the author. For reimbursement, the author must provide a Cornell departmental account to which the funds can be transferred.

Fund Cap. The Provost and the Library have committed a total of \$50,000 to fund the COAP program in the 2016-2017 academic year. Funding for works that comply with the eligibility criteria will be distributed on a first-come, first-served basis; if funds are depleted before end of the fiscal year (June 30, 2017), the program will be closed to new submissions for the rest of the funding period.

Application Process: Articles, chapters, and books accepted for publication up to a year prior to the funding request are eligible for this program. Requests for funding should be made after a work is accepted for publication. Requests should be made using this form.

Regular Review. All aspects of this program, including the amount of funding committed to it, will be analyzed and reviewed on a regular basis. The COAP program is an experiment and continued funding is decided year to year.



[Home](#) » [Programs](#) » [HOPE Fund](#)

HOPE Frequently Asked Questions

HOW TO APPLY

- [How do I apply for funds?](#)

ELIGIBILITY

- [Who is eligible to receive funds?](#)
- [What fees can the fund reimburse?](#)
- [What publication venues are eligible?](#)
- [What if the research in the article was grant-funded?](#)

AWARD AMOUNTS

- [What limits on reimbursement are there?](#)
- [What if there are multiple authors on an article?](#)

OTHER

- [What is the tax status of reimbursements?](#)
- [Who decides other aspects of the fund's implementation?](#)
- [Is information about the fund's use available?](#)

All our FAQs

[Author FAQ](#)
[Author Addenda FAQ](#)
[OA Policy FAQ](#)
[DASH FAQ](#)
[Depositing FAQ](#)
[HL Digital Reproductions FAQ](#)
[HOPE Fund FAQ](#)
[Publisher FAQ](#)

Still have questions?

Contact the [OSC](#) or the [Open Access Liaison](#) for your community.

Q: How do I apply for funds?

Articles submitted for publication after Sept. 1, 2009 are eligible for this program. Requests for funding may be made before an article is accepted or immediately upon acceptance, by completing [this form](#). You'll also need to make sure that you have deposited a copy of the article in [the DASH repository](#) before the reimbursement can be made.

[Back to top](#)

Q: Who is eligible to receive funds?

Funds are available for researchers at Harvard schools that have instituted an [open-access policy](#). Faculty, researchers, staff, and students may request reimbursement for articles connected with their research activities at these schools. Funds for HMS affiliates are limited to quad-based faculty, researchers, staff, and students.

[Back to top](#)

Q: What fees can the fund reimburse?

Reimbursable article-processing fees may include publication fees (charges levied on articles accepted for publication, including page charges), and submission fees (charges levied on articles submitted for publication). Eligible fees must be based on a publication's standard fee schedule that is independent of the author's institution.

[Back to top](#)

Q: What publication venues are eligible?

The venue of publication must be an established open-access journal, that is, a journal that does not charge readers or their institutions for unfettered access to the peer-reviewed articles that it publishes.

Journals with a hybrid open-access model or delayed open-access model are not eligible. To be eligible, a journal must meet these additional requirements:

- Be listed in the Directory of [Open Access Journals](#) (unless the journal is too new for DOAJ eligibility),
- Be a member of the [Open Access Scholarly Publishers Association](#) or adhere to its [Code of Conduct](#),
- Have publicly available a standard article fee schedule,
- Have a policy to substantially waive fees in case of economic hardship. Currently, all of the major open-access publishers satisfy these conditions.

We trust requesters to make appropriate decisions about the quality of the publication venue and the value of its services in relation to the fees it charges. As we gain experience with administering the fund, we may institute further procedures for vetting venues.

[Back to top](#)

Q: What if the research in the article was grant-funded?

Articles for which alternative funding is available are not eligible for reimbursement. This includes articles reporting research funded by a gift or a grant from a granting

agency, foundation, or other institution (including Harvard itself) that allows granted funds to be used for article processing fees (whether or not the particular grant had budgeted for such fees and whether or not sufficient grant funds remain), and articles funded by an institution that itself pays article processing fees on behalf of the author (such as [Wellcome Trust](#)).

[Back to top](#)

Q: What limits on reimbursement are there?

There is a nominal limit on the total reimbursement per article of \$3,000, though there are no known eligible journals with fees that reach the cap. The average publication fee for fee-based open-access journals is approximately one-third of the cap.

There is no limit on the number of articles reimbursed, except that authors may receive reimbursement for up to a total of \$3,000 per fiscal year for all article processing fees. Reimbursement can cover 100% of fees up to the cap. Unused amounts do not roll over to future years. Exceptions to the \$3,000 cap may be made based on availability of funds.

We expect, based on the experience of similar funds, that the total outlay of funds in the near term will be minimal, and do not expect to have to limit disbursements further. However, should demand for funds exceed expectations, we may limit access to funds on a first-come-first-served basis. As we gain experience with the process, the method for calculating reimbursement and limitations thereon may be changed over time.

[Back to top](#)

Q: What if there are multiple authors on an article?

In the case of an article with multiple authors, each author is responsible for a prorated portion of any publishing fees. For example, for an article with three authors that is to appear in a journal with a \$3,000 publication fee, each author is responsible for \$1,000 of that fee. If two of the authors are eligible for reimbursement, they may enter an application for \$2,000. If the journal were to have a \$6,000 publication fee, the \$3,000 per article cap will apply and the two eligible authors may only apply for \$2,000 each.

[Back to top](#)

Q: What is the tax status of reimbursements?

For Harvard employees, such as faculty members or paid researchers, the payment or reimbursement of open-access publication fees may reasonably be viewed as a "working condition fringe" (defined in Internal Revenue Code Section 132 as any property or service provided by an employer to an employee to the extent that, if the employee paid for the property or service, the payment would represent a deductible employee business expense). Since working condition fringe benefits are excludible from income, amounts reimbursed to employees from the HOPE Fund would not be includible in income on the employee's Form W-2, and would not be subject to any reporting or withholding.

For non-employee students, the payment or reimbursement of the fees would not be deemed a "working condition fringe", but rather, scholarship or fellowship payments, which are subject to tax under Code [Section 117](#) unless used for qualified tuition and related expenses. Reimbursements thus may be taxable. For U.S. persons, there is no requirement for Harvard to withhold on, or report the amount of, such fellowship payments; any required reporting is done by the recipients on their individual returns. For non-U.S. persons, taxable amounts are subject to reporting on a Form 1042-S, and are subject to withholding, subject to any income tax treaties with the recipient's country of residence, in the same manner as any other fellowship payment to such individuals provided by the University.

[Back to top](#)

Q: Who decides other aspects of the fund's implementation?

Implementation of the fund and reimbursement process is handled by the Office for Scholarly Communication, operating under the advisement of the [OSC Faculty Advisory Committee](#).

[Back to top](#)

Q: Is information about the fund's use available?

Yes, information about fund reimbursements will be made publicly available by the OSC through this web site. A list of HOPE-funded articles is maintained at <https://osc.hul.harvard.edu/programs/hope/awards/>.

[Back to top](#)

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Q

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SOAR Fund

SOAR Fund FAQs

SOAR Fund Guidelines

Proposal to Create an Open Access Fund (Approved, April 18, 2014)

SOAR Fund Annual Reports and List of Supported Research

SOAR Fund Guidelines

"Supporting Open Access Research" (SOAR) Fund
at University of Massachusetts Amherst
(SOAR Fund at UMA)

The University of Massachusetts Amherst (UMA) Supporting Open Access Research (SOAR) Fund underwrites reasonable article-processing fees for open access journals when funds are not otherwise available. The fund is supported by the University Libraries, which have contributed \$25,000 for FY 2014-2015.

The goals of the UMA SOAR Fund are to:

- build innovative models of scholarly publishing, in particular publications that are not supported by subscription revenue models or user-access fees;
- increase access to research and scholarship from the UMA; and
- support UMA faculty, students, and staff who choose to publish in open-access journals but lack other sources of funding for article processing fees.

Process

Authors with a manuscript accepted in the current fiscal year (determined on a rolling basis) for publication in an eligible journal or venue may apply for funds by submitting an application; documentation of the peer review and acceptance; and proof of payment of the article page charge. Applications will be accepted on a rolling basis throughout the year until funds are fully expended.

Eligibility

Up to \$3000 in UMA SOAR funding per applicant may be available annually on application from:

- Any current UMA faculty member, post-doctoral researcher, staff member, or graduate student author
- who has no other source of funding for open access publication charges, for
- publication charges for scholarly peer-reviewed articles, chapters, or published contributions, in
- eligible publication venues.

UMA SOAR is a funding source of last resort, available only to authors for publications for which no other sources of funding are available. Authors whose grants include funding for publication charges, or who have support from other venues, must apply those funds first.

For example, the National Institutes of Health, the Wellcome Trust, and the Howard Hughes Medical Institute all provide funding for open access publication. Authors must apply to those sources of funding first. Only if those funds are exhausted or not available for some other reason will UMA SOAR support be available. Authors must document their funding sources and efforts.

Eligible applications will support open access publication of **completed manuscripts, reviewed and accepted for publication, but not yet published.** This can include:

- scholarly peer-reviewed journal articles;
- chapters or contributions to peer-reviewed scholarly monographs (not textbooks); and
- scholarly peer-reviewed monographs.

Eligible publications and publishing venues must be fully and immediately open access. Publications in "hybrid open-access" (which also charge subscription fees) or "delayed open-access" journals and monographs are not eligible.

- Journals must be **fully and immediately open access**, in their entirety.
- Monographs must be **fully and immediately open access**, in their entirety.
- Journals or monograph publishers must be members of the Open Access Scholarly Publishers Association (OASPA), <http://oaspa.org/>, OR demonstrably adhere to the OASPA Code of Conduct (many of these journals are listed at the Directory of Open Access Journals, <http://doaj.org/>);
- Journals or monograph publishers must have a standard article fee schedule, publicly accessible, and a policy to waive fees in cases of economic hardship or economic equity.

Additional Restrictions and Limitations

- Funding is available **annually** for any one author up to \$3000.
For example, a faculty member may apply for two separate awards of \$1500 each for two publications, or one award totaling \$3000.
- Funding is available for any one paper up to a maximum of \$3000.
For example, a paper with two UMA authors may be the subject of only one application for UMA SOAR support. The funding may be counted against either author's allocation, or both, as the authors choose.
- Support for non-UMA collaboratively authored papers will be available on a prorated basis.
For example, if a UMA author collaborates with a non-UMA author, the UMA author may submit an application for support for up to \$1500 for a single publication.
Financial hardship on the part of non-UMA collaborators may be considered but will not in any case increase funding beyond the \$3000 annual and per-article maximums.
For example, a UMA author collaborates with a non-UMA author from a developing nation, who has no access to funding sources. The UMA author may apply for a waiver of the proration calculation on that article, citing financial hardship in support of a request to pay the entire fee. Please note: Journals should have a policy to waive fees in case of financial hardship, and this should be the first approach.
- All works will be deposited on UMA Amherst ScholarWorks.

NOTICE: UMA SOAR will provide funds on a first-come, first-serve basis, apportioned equitably to those with eligible publications, until UMA SOAR funds are exhausted. UMA SOAR cannot guarantee funding in advance, and authors should only consider themselves funded after their application is approved and they have received a notice of award.

Administration

The UMA SOAR is administered by the Scholarly Communication Department at the UMA Libraries. Applications are reviewed by an ad hoc team of reviewers, including librarians and faculty not affiliated with the application. Awards and lists of publications will be accumulated annually and posted at the University Library website. Funding for future years will be dependent on number of applications, available funds, and evaluations of the program. We encourage feedback about the program. Please contact ScholarWorks@library.umass.edu.

UMass Amherst Libraries--July 2014.
revised: Feb. 10, 2016.

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Northwestern Open Access Fund

The Northwestern Open Access Fund is a program to support Northwestern scholars who wish to make their journal articles openly available immediately upon publication, and to support gold open access publishers around the world. The Fund will help cover an article processing charges (APC) to publish in open access journals if a Northwestern author does not have other sources to pay these charges.

The gold open access journal model publishes all of a journal's articles as open access and allows for freely available access immediately upon publication. The Fund policy also stipulates that there be no embargo on any part of the content. The funding is modest and is intended to pay for article processing costs and not costs for peripherals, such as images, or color enhancement of images. The Northwestern Open Access Fund is available for authors who do not have other sources of funding to cover publication costs, such as research grants, or departmental funds. There is a limit of up to \$3000 per award per author for each fiscal year (September through August).

To apply for support from the Northwestern Open Access Fund, please fill out [this form](#). Questions may be submitted via email to [Northwestern Open Access](#).

FAQ

As members of the Northwestern community submit questions about the fund, these questions and their answers will be collected [here](#).

What charges does the fund cover?

Article processing fees or publishing fees. The fund does not cover submission fees or personal or institutional subscriptions or sponsorships.

Digital Scholarship Services

Northwestern University Libraries
www.library.northwestern.edu/research/scholarly/digitalscholarship@northwestern.edu

John Dorr
Head, Digital Scholarship Services
Contact

Cunera Buys
Data Management Librarian
Contact

Josh Honn
Digital Humanities Librarian
Contact

Liz Hamilton
Intellectual Property Specialist
Contact

SPEC Kit 353: Funding Article Processing Charges

89

What content types are eligible?

Articles accepted for publication in peer-reviewed open access journals. Articles may not still be under review; they must be accepted.

Are any access restrictions acceptable?

The fund cannot be used to support "hybrid" open access publishing, or to cover publishing fees where an embargo is required. The hybrid model is used to make individual articles available in journals that require paid subscriptions to access the remainder of articles.

What constitutes an acceptable open-access journal?

Any peer-reviewed journal that meets each of the following criteria:

- the journal is listed in the [Directory of Open Access Journals](#) or is a member of the [Open Access Scholarly Publishers Association](#)
- the journal's publisher is conducting business in a manner consistent with the [OASPA Code of Conduct](#).
- the journal is published in a fully open access format based on a published schedule of article processing fees.

Who is eligible?

Faculty members, post-doc researchers, graduate or professional students and any staff who are authors of articles accepted for publication in a peer-reviewed, open access publication.

With what requirements must subsidized authors comply?

Authors must deposit a digital copy of their article with one of the official Northwestern libraries. The library will preserve and make these works available in an institutional digital repository.

What considerations are given to external funding?

Articles are not eligible if the research is funded by a gift or grant from an organization that allows funds to be used for APC, regardless of whether these were actually budgeted for or if the grant budget is exhausted, or if the research was funded by an organization that pays APC.

How are intramural collaborations handled?

Each author will be responsible for a prorated portion up to a total per-article cap of \$3,000.



Are there restrictions for repeat usage?

The fund will provide up to \$3,000 per Northwestern researcher per fiscal year. As funds allow, exceptions will be considered for requests above this annual cap.

Fund Size

In any given year funding is limited and may be adjusted at the discretion of the Northwestern University Libraries. Funding for articles that comply with the eligibility criteria will be distributed on a first-come, first-served basis.

Date limit on fund/fund expiry date, if any

There is no date limit on the fund at this time, but the support and impact of the fund will be evaluated on an annual basis during the normal budget cycle.

Who is currently funding the Northwestern Open Access Fund?

The fund is supported by the Northwestern University Libraries.

Who will administer the fund?

The fund is administered by a group of scholarly communication experts in the libraries, and funds disbursed by the libraries' acquisitions department. Request funding by filling out this form.

Questions?

For more information contact us at Northwestern Open Access.



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OPEN ACCESS (OA) SUBVENTION FUND POLICY

Who Is Eligible?

Any current University of Oklahoma-Norman regular faculty member, post-doctoral researcher, staff member or student author. Preference is given to authors who have not been previously funded.

What is Eligible?

Articles: Article-processing fees for scholarly, peer reviewed articles in true open access journals, listed in the [Directory of Open Access Journals](#). Publisher must be a member of the [Open Access Scholarly Publishers Association](#) or adhere to its [Code of Conduct](#). Articles with a hybrid or delayed OA model are not eligible through this fund.* The journal must have a publicly available standard article fee schedule published and should have a policy to waive fees in case of economic hardship.

Books: Processing fees for scholarly, peer-reviewed books published open access. Publishers may be listed in the [Directory of Open Access Books](#). Publisher must be a member of the [Open Access Scholarly Publishers Association](#) or adhere to its [Code of Conduct](#).

Reimbursement

The fund is to support open access to research articles or books created without grant/gift funding. Articles or books for which other publication funding is available will not be eligible. Authors may receive funding up to \$1,500 per fiscal year for publishing and processing fees, including open access pages charges; unused amounts will not roll over to future years. In the case of an article or book with multiple authors, each eligible author may apply for reimbursement for a prorated portion of the eligible fees.

Reimbursement is made after publication and proper documentation of payment of publication fees is received. Documentation must include proof of fee payment, such as a credit card statement or receipt, and a verifiable link to the open access version of the work.

Institutional Repository


Authors agree to retain their copyright and to post a copy of their work in the University's institutional repository, SHAREOK.

*The Office of the Vice President for Research will consider applications for other subvention needs.

PENNSYLVANIA STATE UNIVERSITY LIBRARIES

Penn State Libraries Open Access Grants

<https://libraries.psu.edu/services/research-data-services/scholarly-publishing-services/open-access-publishing/penn-state>



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CONTACT

Publishing and Curation Services

310 Pattee Library
University Park, PA 16802
814-865-2486
814-865-3665 (fax)
ul-pcs@lists.psu.edu

Penn State Libraries Open Access Grants

The Penn State Libraries Open Access Fund supports open access to peer reviewed articles where it is the policy of the funding body (e.g. NEH, NSF) not to cover publication fees. Articles that result from current grants that will cover publication fees are not eligible for funding, nor ones where an academic department or other entity is providing some financial support for the publication. Authors are strongly encouraged to include open access article processing fees in future grant applications.

To apply for a grant, please follow the link to the online application. Once received, the application will be reviewed for eligibility by the Penn State Libraries Publishing Board based on the criteria listed below.

Grants have been distributed. Watch this space for updated information in the new budget year.

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Author Eligibility:

During the pilot program, any current Penn State faculty member, researcher, post-doc, graduate student, or staff member may apply for a grant of up to \$2000 per article to pay for article processing fees. Undergraduate authors may also be considered for grant awards with the endorsement of a faculty adviser directly involved in the research project.

- Authors are limited to one award per academic year.
- First-time applicants will get preference for funding.
- Authors may apply for funding at any time from article submission to acceptance by the publisher. The application must include a funding request based on published fees of the journal.
- Funding for the pilot is limited and awards are under the Board's purview for selection and funding. A successful applicant may not receive the entire amount requested. Applications will be reviewed in the order in which they are submitted. Funds are released after the article is accepted by the publisher and provided a publication date.
- Articles co-authored with authors from other institutions will be prorated and only the Penn State-affiliated author's prorated share of the fee will be eligible for funds. Articles co-authored entirely by Penn State-affiliated authors will be considered for funding as if they were authored by a single Penn State author.
- As a condition of the grant, authors must agree to submit a post-review copy of the article to ScholarSphere with open access permissions. Authors are encouraged to submit to open access disciplinary-based repositories as well.
- Authors must include the following statement in the author's acknowledgements and in the ScholarSphere description info field:

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93

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Penn State Libraries Open Access Grants

<https://libraries.psu.edu/services/research-data-services/scholarly-publishing-services/open-access-publishing/penn-state>

Content Eligibility

- At this time only scholarly peer-reviewed journal articles will be considered for funding.

Journal Eligibility:

- Eligible publications must provide free, immediate, online access to the full text of the research article upon publication without restrictions. Access may be provided by an available pre-print or post-print version of the article.
- Eligible journals may include those listed in the Directory of Open Access Journals or publishers that are generally compliant with the Open Access Scholarly Publishers Association's Code of Conduct.
- Journals must be peer-reviewed.
- Journals must make their standard fee schedules publicly accessible.
- "Hybrid" open-access publishing, such as subscription-based journals that make some articles available after an author pays fees, are not eligible for funding.
- Any journals or publishers whose legitimacy is in doubt or are listed in Beall's List of predatory scholarly open-access publishers require greater scrutiny by authors and the University Libraries.
- Ultimately, the eligibility of the journal is the purview of the Penn State Libraries Publishing Board.



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REQUIREMENTS

Author Eligibility

SIU COPE grants are available to faculty, including nontenure track faculty, and graduate students on the Carbondale campus. **Only one author per article may apply.** Authors may not submit applications to cover the fees for a journal when they or any of their co-authors hold a financial interest in the publishing company that publishes the journal.

Journal Eligibility

Grants are available for open access journals, which are journals that do not charge a fee for institutions, libraries or readers for access to the content, and do not have an embargo period for access. Journals are subject to review based upon review process, reputation, presentation, marketing techniques, acceptance rate, and other factors as needed. In addition, journals must meet at least one of the following criteria:

- Members of the [Open Access Scholarly Publishers Association \(OASPA\)](#)
- Inclusion in the [Directory of Open Access Journals](#) and provide explicit permission to authors to retain distribution rights

Fee Eligibility

Only those fees associated with open access publishing are eligible for support. Costs for reprints, color illustration fees, non-open access page charges, administrative charges and other fees are not supported.

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Articles whose underlying research was funded by grants that allow funds to be used for open access fees are not eligible for funding.

Maximum Support Limits

In order to include as many authors as possible while covering typical costs, the following limit applies to support awards for each author:

- \$1500 per article and per year

Review Process

Disbursement is determined on a first come first served basis, provided all guidelines are met. The SIU Cope Fund review committee will confirm eligibility.

Submission to OpenSIUC

The SIU COPE Fund is part of Morris Library's commitment to support open access, which also includes management of the SIU institutional repository, OpenSIUC. **Acceptance of open access grants requires submission of the supported article to OpenSIUC within three months of publication.** Questions about OpenSIUC, including details about the submission process, can be emailed to opensiuc@lib.siu.edu.

Application for Support

To apply, complete the [SIU COPE Fund online application form](#).

Related Links:

[SIU COPE Fund Application](#)

[Compact for Open Access Publishing](#)

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2014 Open Access Week

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Guidelines

- » All faculty, staff, graduate, and undergraduate students are eligible.
- » Funds are available to underwrite article processing fees for scholarly peer-reviewed articles accepted for publication in an open access or hybrid OA journal.
- » Support is limited to \$1500.00 per article and \$3000.00 per author per year. For papers with multiple Virginia Tech co-authors, the program would still subsidize the same total amount of up to \$1,500 per article but it would be prorated among each of the authors for the purposes of calculating amounts towards the annual limit for individuals, for example, 3 Virginia Tech authors counted at \$500 each.
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- » For hybrid OA journals, the publishers must have reduced institutional (i.e. library) subscription prices, or plan to reduce prices this next year, based on the number of open access publications in the journals. Example publisher hybrid policy: <http://oxfordjournals.org/en/oxford-open/>. You can find discounts available at <http://lib.vt.edu/openaccess/discounts.html>.
- » Funding is limited and will be disbursed to authors upon approval and in the order in which they were received.

Application process

Start by completing an Open access subvention fund request form , 1) immediately upon acceptance or 2) after an article is accepted. The application is sent to a team in University Libraries that reviews applications and vets and prioritizes them based on criteria for eligibility, guidelines, and available funding. The program is administered by University Libraries and is under the guidance of the Faculty Senate's University Library Committee.

Reimbursement

After the application is accepted and the author is sent notification of approval, the author sends University Libraries an invoice or other proof of payment, and University Libraries reimburses the department or sends payment directly to the publisher.



Gail McMillan
Director , Scholarly Communication

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gailmac@vt.edu
2036 Newman Library (0434)
560 Driftfield Drive
Blacksburg, VA 24061

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- » Glossary of OA terms

Open access news

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- » An Overview of Open Education Policy and Practice in Scotland | Open Education Working Group Sep 22, 201612:09 PM
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Western Libraries Open Access Fund Terms and Conditions

1. Fund Size

1.1 The value of the fund will be determined by Western Libraries each fiscal year. For 2016/2017, the total value of the fund is \$60,000 Canadian.

1.2 The Fund is available to successful applicants on a first-come-first-served basis.

1.3 The Fund will provide up to \$2,400 (Canadian) per article, book, or book chapter.

2. Author Eligibility

2.1 At the time of application, an eligible applicant must be a current

- faculty member (full-time or part-time) at Western; or
- postdoctoral fellow at Western; or
- graduate student at Western; or
- librarian or archivist at Western; or
- research assistant; or
- other staff member

2.2 People from the affiliate colleges are not eligible.

2.3 The applicant must be either the first author or the corresponding author of the article.

2.4 In the case of an article with multiple authors, if both the first and corresponding authors are Western researchers, either one of them but not both can apply for the funding support.

2.5 If the applicant has received a grant from a research funding agency, s/he must declare that the publication fee for the article has not already been covered by the grant.

2.6 Applicants are eligible for up to two grants per year.

2.7 Retrospective applications for articles for which the authors have already paid the OA charges are not eligible.

2.8 Funds are available for the fiscal year in which the application is approved and for the subsequent fiscal year. Following that, the funds will be withdrawn. (For example, an application approved on February 9, 2015, during the 2014/15 fiscal year, will be available until the end of the 2015/16 fiscal year: April 30, 2016.)

3. Eligible Types of Publications

3.1 Peer-reviewed journal articles accepted for publication into open access journals that are listed in the [Directory of Open Access Journals](#), or meet the DOAJ's [selection criteria](#). In particular, "hybrid" journals, which normally require a subscription to read, but provide an "open access option" for a supplementary author fee, are not eligible for funding.

3.2 Books, or book chapters (no textbooks), which are published by a publisher that is a member of the [Open Access Scholarly Publishers Association](#) or meet their [Code of Conduct](#).

3.3 Funded articles, books, or book chapters will be freely available online immediately upon publication.

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3.4 The journal does not require that the author(s) to transfer copyright to the publisher, and the author(s) retain control over the future use of the work. In particular, if the journal makes articles available under a CC-BY-NC (non-commercial use only) license, and it is the **publisher** who controls future commercial use of the content, rather than the author, then that is unacceptable.

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