

# OPEN ACCESS AUTHORS' FUND

## TERMS OF REFERENCE

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### 1. OVERVIEW

The Open Access Authors Fund (OAAF) subsidizes reasonable article processing charges (APCs) for fully Open Access scholarly articles, books, and book chapters produced by full members of the McCaig Institute for Bone and Joint Health as well as their graduate students and postdoctoral researchers of the McCaig Institute for Bone and Joint Health fellows. Open Access is the provision of unrestricted access to journal articles and other scholarly information published via the web. There is no fee for accessing, printing or downloading material; copyright and licensing restrictions for OA focus on providing appropriate credit for the work rather than control and fees.

### 2. APPLICANT ELIGIBILITY

- (a) To be eligible for an OAAF, authors must:
  - Be full McCaig Institute members, or their trainees or postdoctoral researchers
  - Demonstrate that they have other sources of funding to fulfil the full publication cost above the McCaig Institute's contribution.
  - Had affiliations with the McCaig Institute at the time the research took place
  - Submit an article or publication clearly relevant to musculoskeletal research
- (b) Individuals are eligible to be co-applicants on multiple applications.
- (c) Individuals listed as the Principal Applicant can only be on one concurrent OAAF.
- (d) There will be no more than two allocations per researcher per calendar year, with preference given to first allocation.

### 3. PUBLICATION ELIGIBILITY

#### JOURNAL ARTICLES

- (a) The fund will pay APCs for articles accepted for publication in open access journals listed in the Directory of Open Access Journals ([www.doaj.org](http://www.doaj.org)). Journals listed in the Directory have made a certain level of commitment to quality. If the targeted journal is not in the Directory, please contact [mccaig@ucalgary.ca](mailto:mccaig@ucalgary.ca) before submitting your paper.
- (b) The fund will subsidize APCs in fully open access journals. These journals make all content (articles, editorials, letters, appendices, data, etc.), in all formats (HTML, pdf, etc.), in all issues (current and older), openly accessible.
- (c) Articles accepted for publication in hybrid open access journals **will not be eligible** for coverage by the fund. (A hybrid open access journal is a journal that only makes selected articles open access upon payment of an additional 'unlocking' fee.)
- (d) Journals/publishers that have differential charges for Creative Commons (CC) licenses will not be eligible.

#### BOOKS/MONOGRAPHS

Because the open access environment for scholarly books is still evolving, eligibility will be assessed on a case-by-case basis. However, these criteria will apply:

- a) Scholarly books supported by the Open Access Authors Fund should be openly accessible immediately upon digital publication.
- b) In the case of contributed chapters to a multi-author volume, the entire volume must be published in an open access basis in order for individual chapters to be considered for funding.
- c) Books and book chapters must be published by reputable, peer-reviewed, scholarly presses; for example, members of the Open Access Scholarly Publishers Association or presses adhering to their membership criteria.
- d) The University of Calgary Press is an Open Access book publisher. Other Open Access publishers found via the Directory of Open Access Books.

### 4. FUNDING AMOUNTS

- a) The fund will subsidize up to two successful applications per author per fiscal year (April 1 – March 31)
- b) The fund will limit grants to a maximum of \$1,500 CAD per successful application:
  - For an article or book chapter featuring multiple eligible authors, one grant to a maximum of \$1,500 CAD will be awarded to that article or chapter.
  - For a monograph featuring multiple eligible authors, one grant to a maximum of \$ 1,500 CAD will be awarded to that monograph.
  - For an edited collection featuring multiple eligible authors or editors, one grant to a maximum of \$1,500 CAD will be awarded to that collection.

### 5. APPLICATION PROCEDURE

- a) To apply for funding, please complete the reimbursement application form.
- b) Applicants will be notified as to the status of their funding request within fifteen business days. If applicants have any questions about the process, they are encouraged to email [mccaig@ucalgary.ca](mailto:mccaig@ucalgary.ca)
- c) If approved, applicants are required to pay the publishing fee themselves first and then seek reimbursement from the institute, via submission of an [Expense Claim](#) form and proof of publication (i.e. journal receipt).
- d) Funding is available on first-come, first-serve basis

### 6. OBLIGATIONS OF AWARD HOLDERS

- a) Awarded applicants agree to certain obligations that include, but are not limited to:
  - Acknowledgement of the McCaig Institute for Bone and Joint Health in publications, presentations, communications and marketing materials associated with the supported research project;