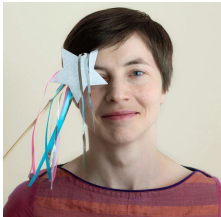# THE SHAPE OF THINGS TO COME

COMMUNITY CALL MAY '24

SPEAKERS & FACILITATORS

AGENDA

- Strategic goals and progress report
- Discussion: Resourcing Crossref for future sustainability
- 2024 Product Roadmap
- Metadata development pipeline
- Crossref and Grants/Funders
- New Content Registration form
- Final questions

OVERVIEW OF STRATEGIC GOALS

Ginny Hendricks / Lucy Ofiesh

FOUR BIG THEMES
CROSSREF.ORG/STRATEGY

Contribute to an environment where the community identifies and co-creates solutions for broad benefit

A sustainable source of complete, open, and global scholarly metadata and relationships

Publicly accountable to the Principles of Open Scholarly Infrastructure (POSI) practices of sustainability, insurance, and governance

Foster a strong team—because reliable infrastructure needs committed people who contribute to and realise the vision, and thrive doing it

Contribute to an environment where the community identifies and co-creates solutions for broad benefit

1. Progress Integrity of the Scholarly Record (ISR)
2. Develop Similarity Check to improve the user experience and add features
3. **Extend support for grant metadata and relationships, and grow adoption**
4. **Align Funder Registry with ROR**

A sustainable source of complete, open, and global scholarly metadata and relationships

5. Metadata matching and relationships discovery
6. Adoption activities to focus on top metadata adoption priorities which are: references; abstracts; grants; ROR (community engagement)
7. **Build new content system**
8. Broad adoption of the GEM Program to include more of the world's metadata
9. **Develop clear metadata development strategy, priorities, and roadmap**
10. **Deliver data citation via the relationships API endpoint**
11. Build a test environment for metadata schema updates
12. Exploring preservation coverage among Crossref membership
13. **Extend new registration form to include articles and other record types and retire Metadata Manager tool**
14. Automating membership processes to support continued growth

Publicly accountable to the Principles of Open Scholarly Infrastructure (POSI) practices of sustainability, insurance, and governance

16. Engaging with other [POSI-adoptee infrastructures](#)
17. Publishing openly all internal policies and documentation
18. Move from data center to cloud
19. Drafting patent non-assertion policy
20. Open support
21. **2024 Public data file**
22. 2022-4 POSI self-assessment update

Foster a strong team—because reliable infrastructure needs committed people who contribute to and realise the vision, and thrive doing it

21. Developing a framework to better track our carbon emissions
22. Reviewing recruitment and compensation practices
23. **Project underway to assess how our resourcing supports Crossref's sustainability**
24. Membership automation
25. Staff retreat planning

Open call for board member applications

Who can do it? Any active member organisation can apply. Actively seeking funding organisations to join the board

What's involved? 4 meetings per year (one in-person) and participation in at least one committee

What's the deadline? Expressions of interest by 27th of May

rossref.org/blog/this-years-call-for-expressions-of-interest-to-join-our-board

RCFS PROGRAM

RESOURCING CROSSREF FOR FUTURE SUSTAINABILITY

Amanda Bartell / Lucy Ofiesh

RCFS Program

1. Program background
2. Share recent research and compare
3. Ask for feedback and questions - use the Q&A box as we go.

PROGRAM BACKGROUND

Core to any discussion of resourcing Crossref is understanding what makes us sustainable long term. Organizational sustainability aligns the impact Crossref makes with the financial position required to support it. We want to conduct a thoughtful, comprehensive review that centers on our long term vision and plans, is guided by well-defined problems and principles, includes board, staff, and community input, and details an implementation plan.

PROGRAM GOALS

1. Making fees more equitable.
2. Simplifying our complex fee schedule.
3. Rebalancing revenue sources.

Goal one: Making fees more equitable

Project 1: Undertake a focused piece of work looking at the lowest membership tier.

Project 2: Review basis of tiers - definitions, levels, distribution.

Goal two: Simplifying our complex fee structure

Project 3: Look at removing backfile discounts so the fee is the same as current content.

Project 4: Review low use record types, specifically volume discounts.

Goal three: Rebalancing revenue sources

Project 5: Reflect increase in metadata usage and perceived shift of value toward metadata distribution.

Membership & Fees Committee

Committee member	Representative	Country	Size (records)	Org/Member type
Academicus Journal	Arta Musaraj	Albania	300	Publisher
ACM	Scott Delman	USA	600,000	Society, Publisher
Beilstein Institut*	Wendy Patterson	Germany	11,000	Publisher, Research Institute
Center for Open Science (COS)*	Nici Pfeiffer	USA	150,000	Researcher Service/Tool
Clarivate Analytics*	Francesca Buckland	USA	11,000	Publisher, Metadata User
DOAJ	Joanna Ball	USA	N/A	Metadata User
eLife	Damian Pattinson	UK	40,000	Publisher
Elsevier*	Alok Pendse	Netherlands	20,000,000	Publisher
Frontiers	Marie Souliere	Switzerland	400,000	Publisher
Institute of Research and Community Services, Diponegoro University	Eko Didik Widianto	Indonesia	20,000	University, Publisher
Japan Association for Language Teaching (JALT)	Theron Muller	Japan	1000	Society
Kampala International University	Ademola Olaniyan	Uganda	380	University, Publisher
Liverpool University Press	Clare Hooper	UK	46,000	University, Publisher

Membership & Fees Committee

Committee member	Representative	Country	Size (records)	Org/Member type
l'Université de Parakou	Honoré Biaou	Benin	60	University, Publisher
Noyam Publisher	Naa Kai Amanor-Mfoafo	Ghana	500	Publisher
Open Library of Humanities	Rose Harris-Birtill	UK	11,000	Scholar-led
Pakistan Journal of Botany	Rehan Saleem	Pakistan	1,500	Publisher
TU Delft Open Publishing	Frédérique Belliard	Netherlands	2,400	University, Publisher
Universidad de Guadalajara	Ramón Willman	Mexico	6,400	University, Publisher
University of Lagos	Yetunde Zaid	Nigeria	130	University, Publisher
University of Namibia	Anna Leonard	Namibia	170	University, Publisher
Vilnius University*	Vincas Grigas	Lithuania	22,587	Society, University, Publisher, Sponsor
Wits University Press	Andrew Joseph	South Africa	1,800	University, Publisher

Other community input

- Surveys
- Focus groups
- Your input today
- Talking to non-members

Goal one: Making fees more equitable

- Focus on annual membership fees
  - Tiered by revenue/expenses
  - Sponsor program
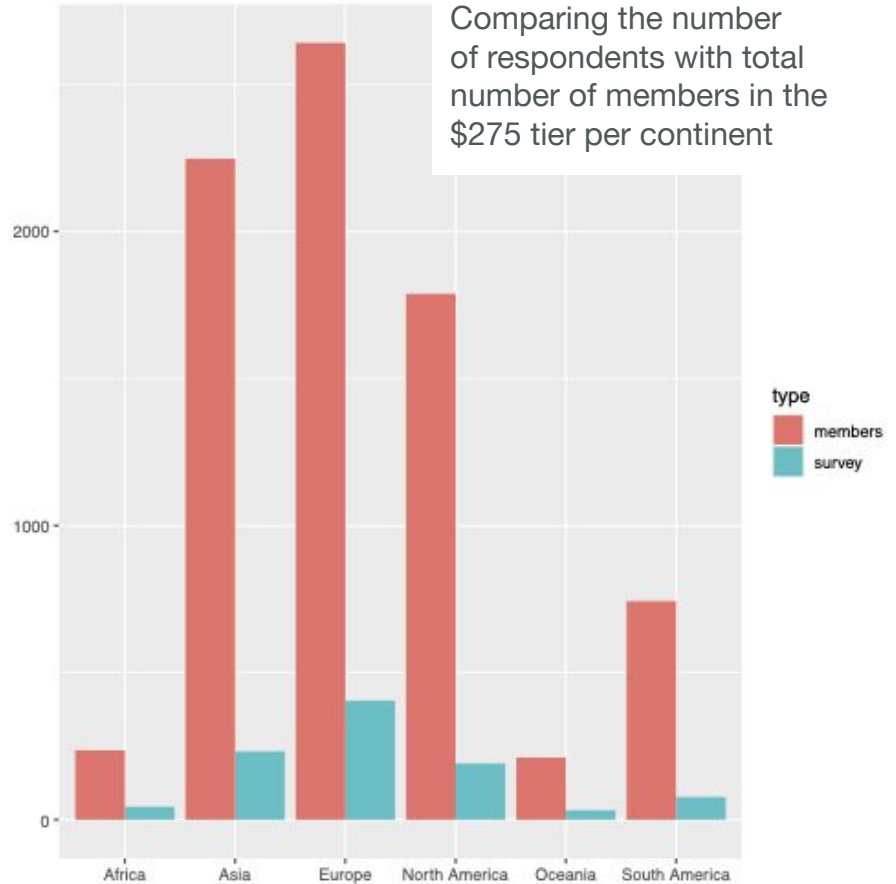 - GEM Program (Global Equitable Membership)

www.crossref.org/gem

Member survey

- 8027 independent member organizations in the lowest annual fee category.
- Questions about member size, funding model & impact of Crossref fees.
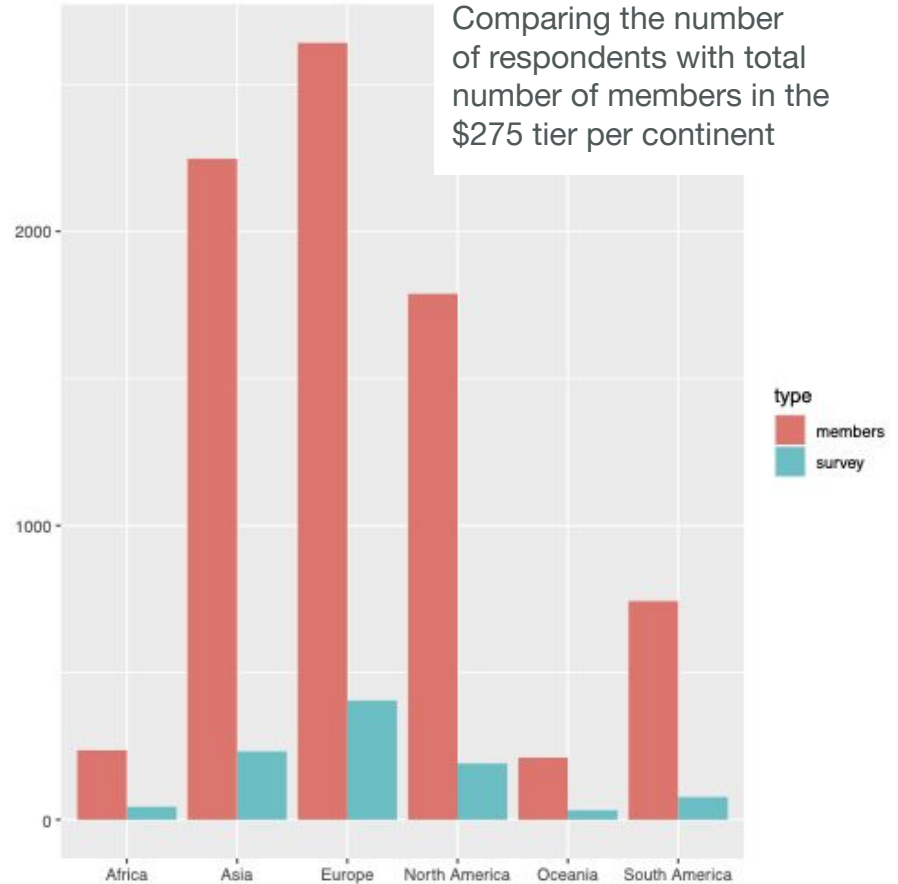- Responses from 986 organizations (12% response rate) - open until May 12th.
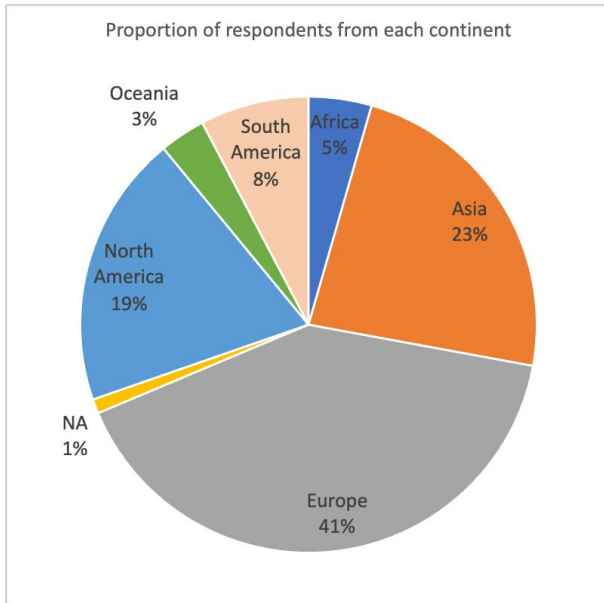
Responses by continent

Continent	Respondents
Africa	44
Asia	232
Europe	405
North America	191
Oceania	32
South America	77

Comparing the number of respondents with total number of members in the $275 tier per continent

Responses by region

Proportion of respondents from each continent

- Oceania 3%
- South America 8%
- Africa 5%
- Asia 23%
- North America 19%
- NA 1%
- Europe 41%

Comparing the number of respondents with total number of members in the $275 tier per continent

type
- members
- survey
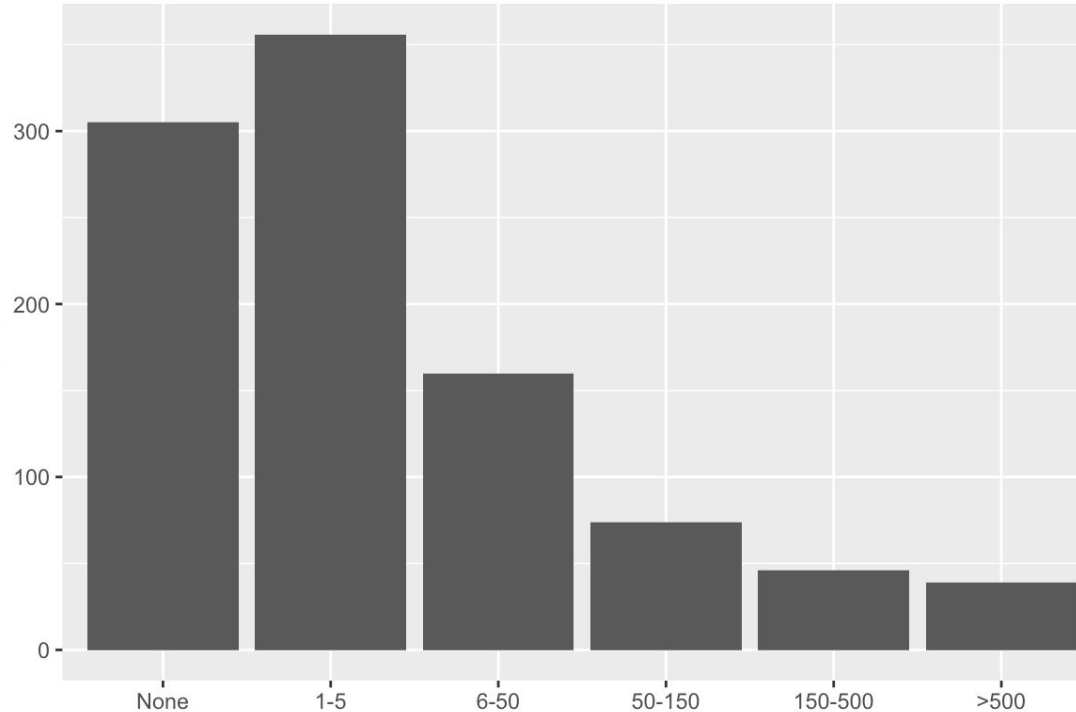
What have we learned so far?

- Poll time - how many of our attendees today are members from this membership fee tier?

Poll time

- How many full-time paid staff does your member organisation employ?
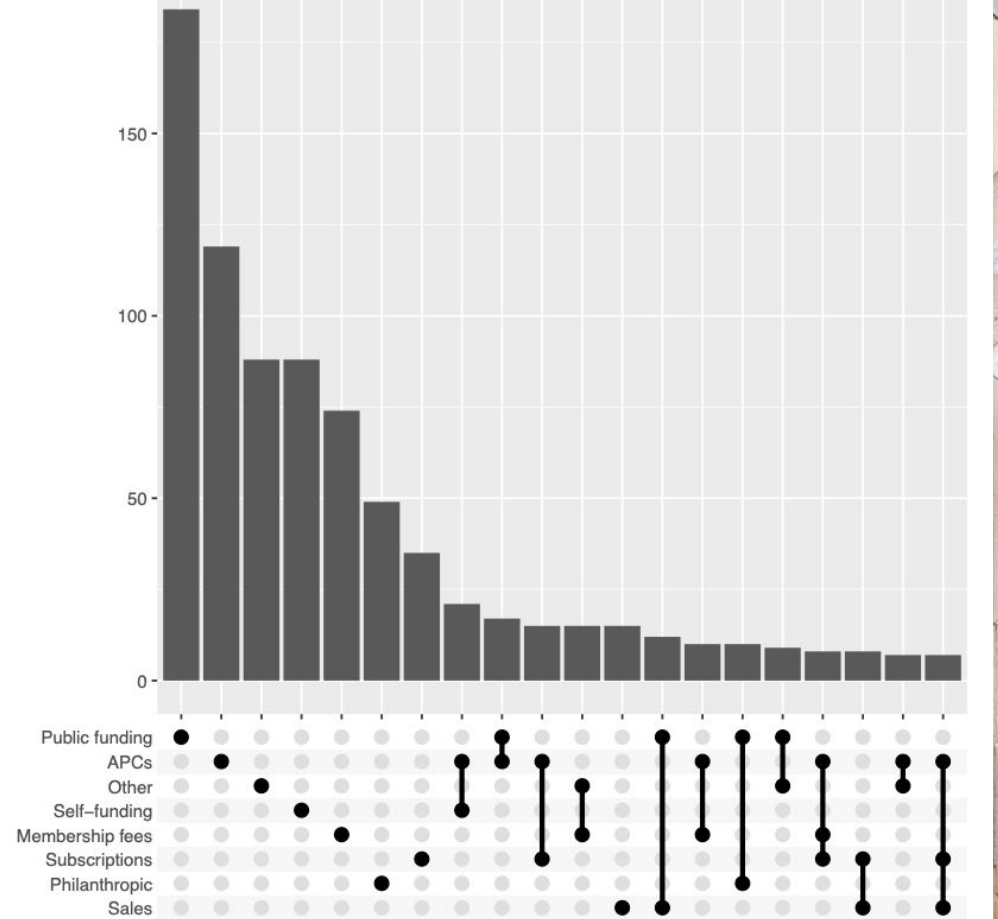
Number of full-time staff

Poll time

- What is the primary source of funds to cover the costs of producing and publishing your content? (please indicate all that constitute at least a third of your funds)?
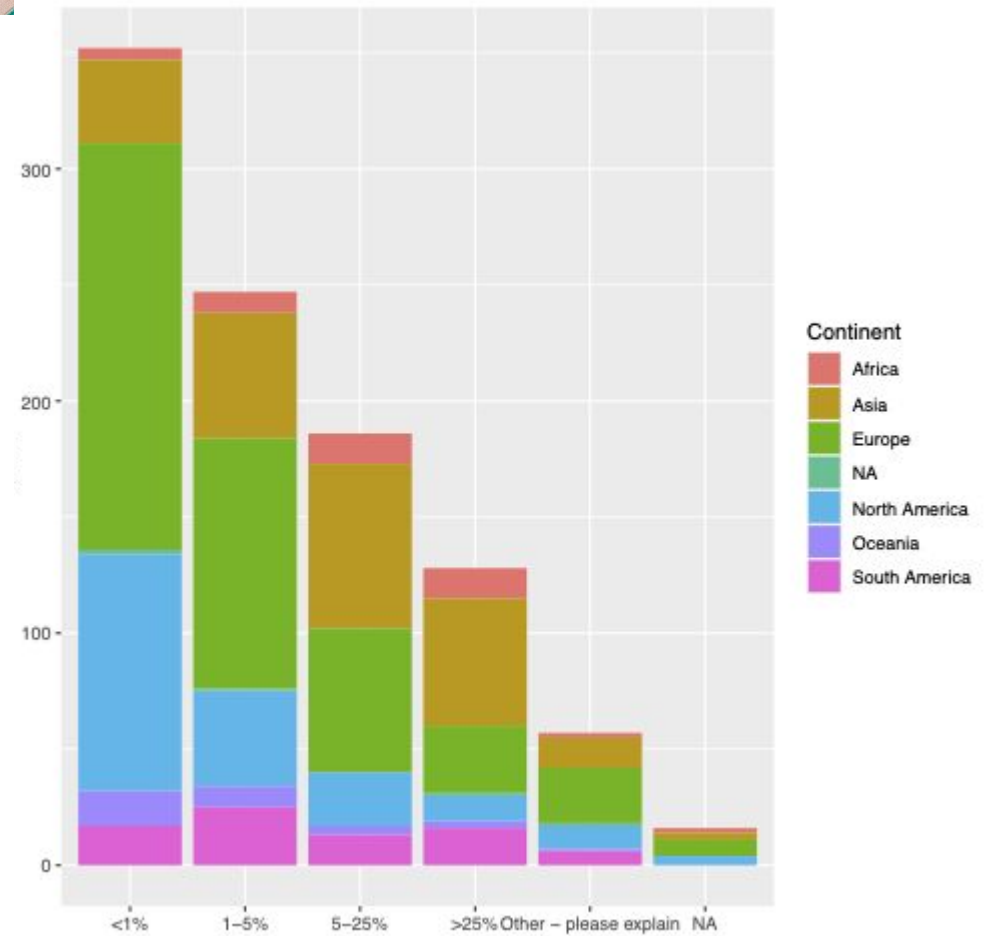
Sources of funding

Poll time

- What percent of your annual expenses do you spend on Crossref fees?

% expenses on Crossref fees

Questions & feedback on the program

What's next

- In the lowest membership tier? Please complete the survey.
- We have an RFI on our blog to conduct community facilitation with non-member journals
- Join the discussion on our forum at : https://community.crossref.org/c/strategy/rcfs/47

Program overview and updates

www.crossref.org/community/special-programs/

PRODUCT ROADMAP

Martyn Rittman / Sara Bowman

Where are we now?

There are cool new things we've tried (and it didn't work out)

There are cool new things we'd like to do (and are doing)

but first...

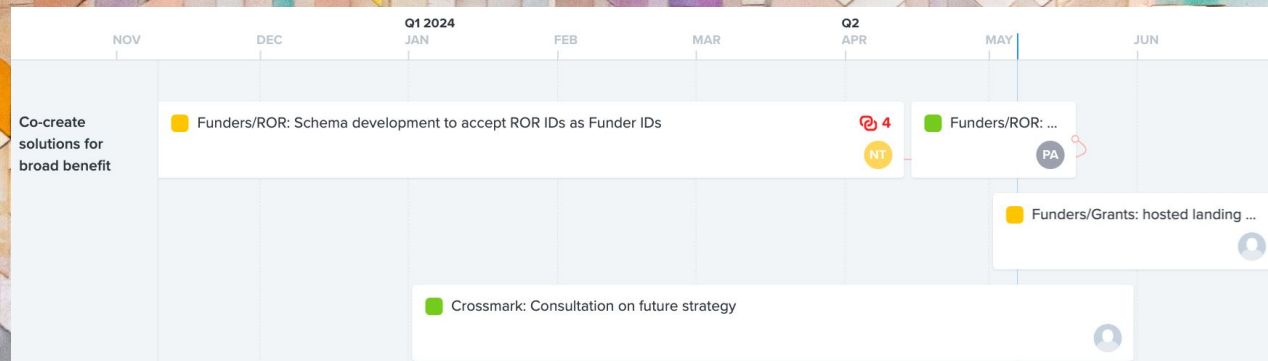We need to pay down some technical debt

What didn't work out?

- The next generation of our content system
- Better support for data citations
- Moving Event Data to a more stable infrastructure

This work is paused while we rework the strategy and focus on other things in our backlog.

How we are moving forward

- Working through backlog of 100+ bugs
- Prioritising production services REST API and Content Registration
- Catching up with metadata schema enhancements
- Reconsidering prioritisation approach:
  - Does it directly serve one or more of our four strategic goals?
  - Is this important to our community? Are our members ready?
  - Maintainability - is this a robust solution?
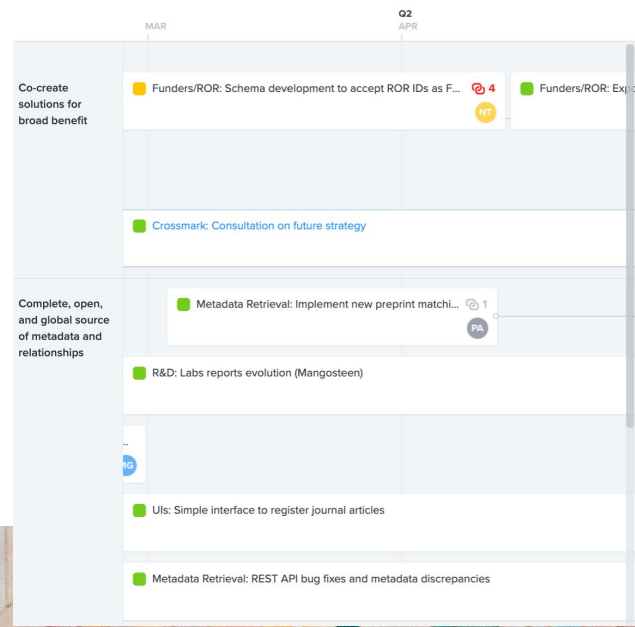 - Will this still be around in five years time (or longer)?

Co-create solutions for broad benefit

- Funders/ROR: Schema development to accept ROR IDs as Funder IDs — 4 — NT
- Funders/ROR: ... — PA
- Funders/Grants: hosted landing ...
- Crossmark: Consultation on future strategy

Crossref / Roadmap views (timed) / by theme

Submit idea · Share

Items: Features · Grouped by: Theme · Status · Configure

Co-create solutions for broad benefit

- Funders/ROR: Schema development to accept ROR IDs as F... — 4 — NT
- Funders/ROR: Exp...
- Crossmark: Consultation on future strategy

Complete, open, and global source of metadata and relationships

- Metadata Retrieval: Implement new preprint matchi... — 1 — PA
- R&D: Labs reports evolution (Mangosteen)
- MG
- UIs: Simple interface to register journal articles
- Metadata Retrieval: REST API bug fixes and metadata discrepancies

---

Crossmark: Consultation on future strategy

DETAIL · INSIGHTS · HEALTH · PORTAL

Focus groups to discuss with those who have and haven't implemented Crossmark. Find out useful features and what could enhance usability, visibility, and increase takeup. Madhura and Martyn to lead.

ADD ATTACHMENT

DEPENDENCIES +

PROGRESS — 50% — MANUAL

SUBFEATURES +

Fields · Comments · History

HIERARCHY	Crossref
TIMEFRAME	Jan, 2024 → May, 2024
TEAMS	Assign
TAGS	Tag
RELEASES	No release set

Co-create solutions for broad benefit

Now

Schema development to accept ROR IDs where we accept Funder IDs (and include them in output)

Crossmark consultation on future strategy ([survey](#))

Next

More schema changes (Patricia is up next!)

Retraction Watch data available through the REST API

Sustainable source of complete, open, and global scholarly metadata and relationships

Now

Extending new content registration form to support journal articles

2024 Public data file

Focus on fixing bugs in REST API

Next

Extending content registration form to more content types

Better support for aliased DOIs in the REST API

Architecture improvements for reliable record ingestion

Next generation of reports

Improved preprint matching

Publicly accountable to POSI

Now

Moving services to the cloud

Next

And out of the data center

Foster a strong team

Training new team members on core systems

METADATA PIPELINE

Patricia Feeney

METADATA PIPELINE

Patricia Feeney

Metadata development

Requests: community request for new or expanded metadata

Assess: evaluate request - how best can we support this, do our members collect this metadata

Prototype / Feedback: model inputs and outputs and ask for feedback, include impact on content registration systems

Production: we make it happen, everyone is happy 😇

Production:

- **ROR as funder identifier:** has been planned and circulated, waiting for production

Feedback/production: typed citations

What is it:

Adding a 'type' to citations supplied with Crossref records

- has been circulated widely but not recently, will confirm list of types (briefly) then implement with next update!

tentative list

- journal article
- book
- book chapter
- conference paper
- dataset
- dissertation
- patent
- poster
- preprint
- report
- software
- standard
- website

Prototyping/feedback

Expand contributor roles: accept multiple contributor roles as well as contributor taxonomies (currently Crossref vocab and CRediT)

Info in Gitlab for now, request for feedback forthcoming!

Prototyping/feedback

- **Preprint updates:** circulating within Preprints Advisory Group for another week, then will circulate for public feedback
- **Grants updates:** have been delayed but will resume work soon

Assess

Multilingual metadata: working group to look at how best to incorporate language metadata into our inputs and outputs as well as best practices (when to require and when to recommend)

Haven't forgotten

Abstracts, contrib identifiers, expanding types of dates supported, flexible content types, keywords, conference identifiers, journal article types

METADATA DEVELOPMENT ROADMAP

DONE
- ROR as funder ID
- metadata pipeline
- Preprints planning
- Grant update planning

NOW
- ROR as funder ID
- Preprints AG recommended updates
- re-prioritizing metadata projects

NEXT
- input schema update: typed citations, roles expansion (CRediT) and …?
- Grants schema updates (minor)

CROSSREF AND FUNDERS/GRANTS

Kora Korzec / Isaac Farley

CROSSREF GRANT SYSTEM

- Streamlines connecting grants, publications, authors, funders, data, etc.
- Tracking long-term reach and return of research support
- Analyse patterns, and anticipate trends
- Standardised metadata openly available
- Globally unique persistent link and funder-designed metadata schema

FUNDERS AND GRANTS

DONE
- FWF (Austria) registered their entire backfile (20k grants)
- Portugal added 10k
- eLife added Grant IDs in their metadata AND online - first publisher to do so
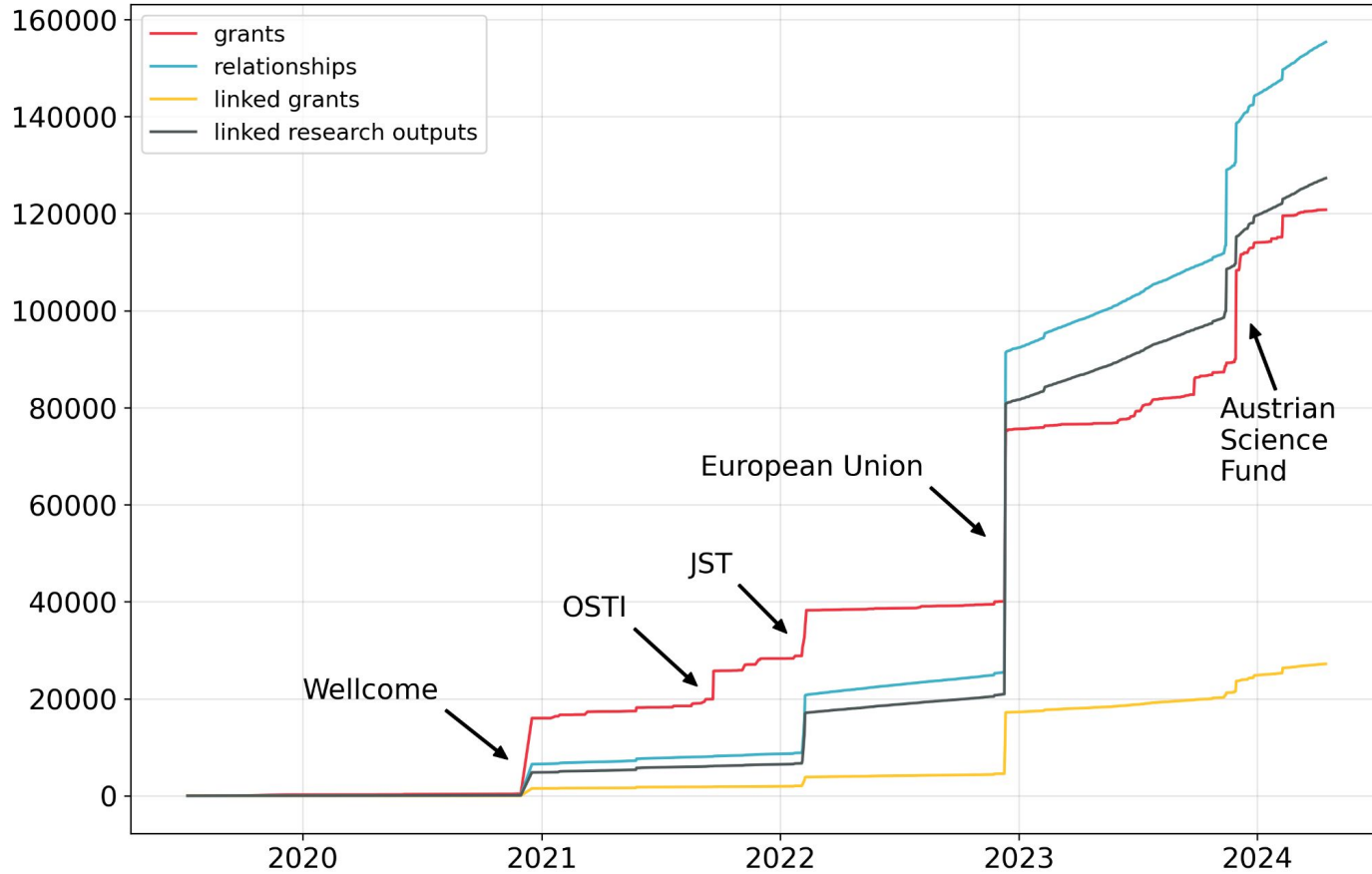- ORFG and DataCite guides published

NOW
- Service Providers that are building/extending integrations
- Advisory Group call last week
- Dominika updated matching results

NEXT
- Five-year community check-in call (to showcase the grant records; get more members joining; ask publishers to collect)
- Introduce Crossref-hosted landing page for grants (Chooser)

Total numbers over time

GRANT-OUTPUT MATCHING

number of	as of 2023-04-16	as of 2024-04-16
grants	76,621	120,819 (+58%)
members registering grants	28	34 (+21%)
matched relationships	98,593	155,475 (+58%)
matched grants	18,114	27,199 (+50%)
matched research outputs	87,114	127,394 (+46%)

CONTENT REGISTRATION FORM

Lena Stoll

A simple web form for registering journal articles

- Building on concept of recently released grant registration form

- No XML knowledge required

- More reliable than deprecated Metadata Manager tool

Keep the conversation going or schedule a live demo via our
Community Forum!

ARTICLE REGISTRATION FORM

LAST QUARTER
- Discuss and test prototype with ambassadors, collect feedback, iterate
- Enable deposits to test system

IN FOCUS
- Testing functional MVP with real-world examples
- UI/UX improvements based on ambassador and staff feedback

NEXT UP
- Release and publicize form to members
- Chart path towards deprecating Metadata Manager
- Weigh up value gained from additional improvements to article form vs other content types (books/book chapters, conference papers?)

Step 1: Article metadata

Article title*
The title of the article. If the article has a subtitle, or multiple titles in different languages, only the primary title should be included. Learn more

Article title*
Extraction of Nobiletin and Tangeretin From Peels of Shekwasha and Ponkan Using [C2mim][(MeO)(H)PO2] and Centrifugatic

Article DOI*
The DOI for the article. This must be unique and use the format 10.xxxx/xxxx, with a prefix associated with your organization. Learn more

Article DOI*
10.5555/282513480

Article landing page URL*
The link to the page where the article DOI will resolve, starting with http:// or https://. The landing page must be outside of any paywalls, be unique to the article, and contain some key information about it. Learn more

Article landing page URL*
https://journals.sagepub.com/doi/full/10.1177/1934578X19845816

Contributors +

1 Mizuno

Family name(s) / surname(s)*
If the contributor has only one name, it should be entered here. Learn more

Family name(s) / surname(s)*
Mizuno

- Basic metadata including abstract and publication dates
- Contributor details including ORCID iDs, ROR affiliations
- Funding metadata
- License and similarity check URLs

Step 2: Journal metadata

Look up journal details based on ISSN

Step 3 (optional): Issue and volume metadata

Article	Journal	Issue	Review	Submit

Issue published in print (optional)

The date when the issue containing the article was published in print. Type in the date or click the calendar icon to select it from a calendar view.

Issue published in print (optional)
17.05.2019

Issue published online (optional)

The date when the issue containing the article was published electronically. Type in the date or click the calendar icon to select it from a calendar view.

Issue published online (optional)
dd.mm.yyyy

Issue number (optional)

If the issue containing the article has a title or numbering, enter it here. Learn more

Issue number (optional)
5

Volume number (optional)

If the volume containing the issue and article has a title or numbering, enter it here. Learn more

Volume number (optional)
14

PREVIOUS   NEXT

Step 4: Review and confirm

Review Metadata

You are about to submit the following metadata. Please check each field carefully and use the "Previous" button to make any necessary changes before completing your submission.

Article

Article title*	Extraction of Nobiletin and Tangeretin From Peels of Shekwasha and Ponkan Using [C2mim][(MeO)(H)PO2] and Centrifugation
Article DOI*	10.5555/282513480
Article landing page URL*	https://journals.sagepub.com/doi/full/10.1177/1934578X19845816

Contributors

#1

Family name(s) / surname(s)*	Mizuno
Given name(s) / first name(s) (optional)	Hitomi
Affiliation / Institution (optional)	Sophia University
Role*	first-author

#2

Family name(s) / surname(s)*	Yoshikawa
Given name(s) / first name(s) (optional)	Hibiki
Affiliation / Institution (optional)	Sophia University
Role*	additional-author

Abstract

#1

Abstract (optional)	The polymethoxyflavonoids nobiletin and tangeretin are isolated from peels of shekwasha (Citrus depressa Hayata) and ponkan (Citrus reticulata Blanco). These natural products possess biological activities, including anticancer and anti-inflammation properties. This report describes an efficient method for the extraction and isolation of nobiletin and tangeretin from citrus peels using 1-ethyl-3-methylimidazolium methylphosphonate ([C2mim][(MeO)(H)PO2])

Step 5: Success!

✓ **Journal Article successfully submitted.**

Keep this copy as a record of your submission activity. The record is a JSON file, which you can load, edit, and resubmit to update your metadata.

DOWNLOAD RECORD

test   Submission ID 1438322830   DOI 10.5555/282513480
                        Use this ID to check the status of your submission.

What's next

Use this link to check the status of your submission in the Crossref Admin portal: 1438322830

We recommend using the Simple Text Query form to deposit the article's reference list: Simple Text Query

START NEW SUBMISSION

Deposit XML is automatically generated by the form

THANK YOU

Mastodon: @crossref@mastodon.online

Twitter: @CrossrefOrg

What are we thinking about: crossref.org/blog

Conversations: community.crossref.org

Get in touch: feedback@crossref.org

Newsletter: Click `Get email updates` in website footer

AMBASSADOR PROGRAM ENGAGEMENT

DONE
- Crossref Nairobi - Kenya
- Crossref Bogota - Colombia
- WACREN - Nigeria
- Publishing Bioethics in Africa webinar
- SCECSAL - East, Central and Southern Africa
- Training: labs and participation reports
- Publishing Bioethics in Africa webinar
- Korean Council of Science Editors Newsletter contribution
- Crossmark consultation
- Test article registration form

NOW
- Reviewing confusing error messages from our system
- Similarity Check updates training

NEXT
- Introduction to Crossref webinar - Nigeria
- GEM webinar - Sri Lanka
- CARLIGH conference - Ghana
- CRECS conference - Peru
- 8th World Conference on Research Integrity - Greece
- ACSE conference - UAE
- ASE conference - Indonesia