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Open access outreach
SMASH vs. Suasion

Some librarians became open access (OA) supporters because they were outraged—and budgetarily hamstrung—by certain commercial publishers' artificially inflated prices. (We know they are artificially inflated, unjustified by production costs, because these publishers have jaw-dropping profit margins, higher than those of Disney, Starbucks, Google, and even Apple.[1]) Other librarians were won over to OA by its more altruistic aspects, by the promise of a world rich in knowledge. However, in their outreach to patrons, librarians cannot rely on the arguments that swayed them. What convinced a librarian to embrace OA may not convert a student, a faculty member, or an administrator. Therefore, librarians must consider what rhetoric works on whom and craft different arguments for different audiences.

In my early work as an OA advocate, I stood at the front of many rooms and cheerfully enumerated the flavors, funding models, and benefits of OA. I opened some eyes, debunked some myths, and changed some minds, but overall I was far less effective than I had hoped and assumed I would be. From my vantage point, OA was a no-brainer, an obvious good for everyone except publishers. I believed that OA could and would sell itself—that everyone, once informed, would embrace it. But I was wrong, and I did not understand why.

Then I read Peter Murray-Rust's stark distillation of the issue: "Closed access means people die."[2] I was sure I had found what I needed. "Fire," I thought. "My presentations need more fire!" So I injected them with more anger, more confrontation, more direct digs at commercial publishers. Among my OA compatriots, my vitriol was a hit. But for the unfamiliar and unconverted, it was too strong, a turnoff. "I can see you have an opinion," one faculty member said as he backed away from a poster featuring a large octopus labeled "Profiteering Publishers."[3] At another event, an officer of a grant-funding agency interrupted me to snap, "You're espousing Venezuelan economics!" Again, I had gotten it wrong: what had galvanized me had alienated my audiences. I had swung from too wonky to too fiery.

Over time, I developed a feel for how to adjust my arguments and tone for different audiences: when to cite policies, when to hype the OA citation advantage, when to issue calls to arms, etc. In this column, I offer some suggestions about which aspects of OA to emphasize to different audiences, with assistance from

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the Open Access Hulk (@openaccesshulk on Twitter).[4]

If you are not familiar with the OA Hulk, he is one of several parodic Twitter incarnations of the Hulk, a comic book character from Marvel Entertainment.[5] The Hulk is the superhero alter ego of Bruce Banner, a brilliant but meek physicist. Banner, who was accidentally exposed to radiation, transforms into the Hulk, an enormous green creature with bulging muscles and a penchant for destruction, whenever he is stressed or angry. He often refers to his human half as "puny Banner," and his defining behavior is "SMASH."

Like the original Hulk, the OA Hulk, who is anonymously authored, speaks in short, forceful sentences, entirely capitalized. The targets of his rage are paywalls, lack of universal access to scholarship, and unethical and otherwise unsavory publisher behavior. However, he is not just angry; he is also smart, witty, and empathic, despite limited grammatical skills. And, I came to realize in my years following him on Twitter, he understands that rhetorical SMASH is not always the best outreach strategy. So I enlisted his help, through a Twitter interview, in my project of describing how best to reach different audiences. I quote him extensively below, and interested readers can find the full interview on Storify.[6]

I began by asking the OA Hulk about his OA awakening, his equivalent of Bruce Banner's radiation exposure. He replied, "PUNY BANNER SIGN AWAY OWN COPYRIGHT. PUBLISHER PAYWALL PUNY BANNER ARTICLE. PUBLISHER WEBSITE DEMAND PUNY BANNER PAY IF PUNY BANNER WANT READ OWN WORK." Many researchers have this experience and feel defeated, exploited by the system. But not in this case: "OA HULK BORN THAT DAY."

I then confessed to the OA Hulk that my righteous fury had not always won converts and asked if he had insights about why my attempts at Hulk-style SMASH had not been a smashing success. He responded pithily: "ANGER FROM WITHIN: MOTIVATING. ANGER FROM WITHOUT: DEMOTIVATING." Outrage drives many OA advocates, but we cannot expect our outrage to similarly spur others. We need fire in our bellies, not fury in our rhetoric, lest it repel our listeners.

More powerful tools, he argued, include humor, solidarity, and praise. "PRAISE POWERFUL. SO, SO POWERFUL." Indeed, his mission may be obliterating paywalls, but most of his Tweets are messages of support, a kind of adrenalized cheerleading. In his words, "MOTIVATING, COMMUNITY-BUILDING WHEN OA HULK SAY 'GOOD JOB! HULK SEE YOU, HULK THANK YOU, HULK [hearts] YOU.' CELEBRATE WINS TO SPARK MORE WINS."

From there, the OA Hulk and I moved on to the topic of customizing OA outreach for different audiences, starting with students. In my experience, students respond best to messaging that connects OA to their concerns—and a primary concern is the cost of their education, which includes the cost of textbooks and other course materials. According to the College Board, books and supplies average more than $1,200 per year for undergraduate students.[7] These costs are often crushing or flat-out untenable, preventing many students from purchasing course materials or causing them to enroll in fewer courses or drop courses.[8] As a result, students are enthusiastic about open educational resources (OER), a topic adjacent to OA scholarly literature. The OA Hulk agrees: "STUDENTS TOTALLY AWARE OF TEXT-BOOK PRICES, GRATEFUL FOR OER. OER GREAT BRIDGE TO OA."

Also, students in research-oriented courses quickly become aware that paywalls prevent them from accessing information they need for their assignments. Because the students of today are the researchers of tomorrow, their dawning frustration is a great opportunity for

instruction about OA and authors' rights. Furthermore, upper-level students are often aware that they will lose access to library databases after graduation. These almost-alumni, even those who do not aspire to be researchers, are hungry for information about OA journals and repositories.

Faculty are difficult to address, as they are not a monolithic group. The OA Hulk also struggles: "FACULTY? IF OA HULK KNEW ANSWER, WORLD WOULD HAVE UNIVERSAL OA ALREADY." Some, especially untenured faculty, are swayed by the prospect of reaching more readers and increasing their impact. Some are unmoved by these arguments, confident that they are already reaching all researchers in their subfield and not particularly interested in finding a broader readership. But these faculty are sometimes attracted to arguments about how OA can help them become a public intellectual or ensure their long-term intellectual legacy.

Among faculty, scientists are generally more familiar and comfortable with OA than their colleagues in the arts, humanities, and social sciences. Thanks to established outlets such as arXiv.org, PubMed Central, and PLOS, the consumption and production of OA literature has been part of many scientists' workflows for years. Indeed, in some sciences, OA is so ubiquitous that those who do not yet make their work freely available are unlikely to begin doing so of their own accord. They have likely heard about the available outlets and their benefits but, for whatever reason, have resisted adoption. They need incentive, and the OA Hulk and I agree about what that incentive needs to be: "FUNDER MANDATES. GRANT-FUNDED SCIENTISTS, GRANT ADMINISTRATORS SPEAK COMPLIANCE LANGUAGE WELL." When lack of compliance with a funder's public access policy means lack of future funding, grant recipients—rational ones, anyway—do what is needed in order to comply.

Unfortunately, grant funding is scarcer outside the sciences. For many humanists and other nonscientists, scholarly societies set the tone. Some actively support OA.[9] For example, the Modern Language Association created the OA repository CORE, and in 2016 ACRL released a statement encouraging academic librarians to make their scholarship OA.[10] Other societies have warned their members away from OA, displeasing the OA Hulk: "SCHOLARLY SOCIETIES, STOP SPREADING FEAR UNCERTAINTY DOUBT. HISTORIANS, YOU KNOW OA HULK MEAN YOU." In 2013 the American Historical Association issued a statement urging graduate programs to allow dissertation embargoes of at least six years.[11] The statement, which was based on rumors rather than research, sowed confusion, fed and spread fears, and set back acceptance of OA in the field of history. Similarly, rumors swirl that OA imperils scholarly society publishers, and thus the societies themselves. For researchers frightened by such statements, there is one cure: cold, hard evidence. (Librarians, keep researching these topics!)

Many researchers, irrespective of discipline, are inspired by the social justice aspects of OA. Once prompted to consider how OA empowers information-seekers everywhere and advances equality, they are eager to add their work to the commons. For these researchers, further convincing is not necessary, but assistance with permissions or technology sometimes is. Librarians must remember that outreach does not end with successful arguments; we must also connect researchers with the people and resources that can guide them from theory to practice of openness.

Just as faculty seek to boost their individual scholarly profiles, administrators seek to heighten their institution's visibility and prestige. "INSTITUTIONS PREEN," the OA Hulk agrees. Anything that helps collect, quantify, and showcase faculty members' scholarly output is catnip to administrators, and I have never seen an

administrator not perk up upon hearing Raym Crow's statement that OA institutional repositories "[h]ave the potential to serve as tangible indicators of a university's quality and to demonstrate the scientific, societal, and economic relevance of its research activities, thus increasing the institution's visibility, status, and public value."[12]

Also, messaging that connects OA to an institution's mission helps position OA projects as essential rather than optional, as administrators look to mission statements as lodestars, especially when devising multiyear plans. But OA Hulk and humans alike know that administrators are most susceptible to financial arguments: "HELP SPEND LESS, ADMINISTRATORS LISTEN." Investment in OA does not lead to immediate cost savings, but large-scale, coordinated resource-shifting efforts such as the OA2020 initiative can, and eventually will, reduce reliance on subscription-charging publishers.[13]

No matter your audience, be mindful that the term *open access* is still jargon—a common term among librarians, but not among most students, faculty, or administrators. Also, remember that the goal is not OA in and of itself but rather the opportunities OA presents for individuals, universities, fields of study, and global publics. Speak in terms meaningful to your audience, with examples and enticements relevant to them. And if you need advice or encouragement, you can always consult the OA Hulk, who lives on Twitter and inside us all.

Notes

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