

Toolkits

This section contains toolkits already available which cover different aspects of open access. As such, they are thematically very varied. There is a lot of discussion about what actually constitutes a toolkit, its aim and purpose but for simplicity's sake, we have kept it to self-identified toolkits, and or tools/guides that provide highly practical guidance to implement.

- [Catalogue of Criteria for Assessing the Funding Eligibility of Open Science Infrastructures](#)
- [COPIM's toolkit for running an Opening the Future programme at an academic press](#)
- [DIAMAS Best Practices checklist for Diamond OA publishers](#)
- [European University Association: The new university Open Access checklist](#)
- [Experimental Publishing Compendium](#)
- [Focused Toolkit for Journal Editors and Publishers: Building Diversity, Equity, Inclusion, and Accessibility in Editorial Roles and Peer Review \(C4DISC\)](#)
- [New University Press toolkit](#)
- [OAPEN: OA books toolkit](#)
- [Open Book Collective toolkit](#)
- [Scholarly Communication Toolkit: Open Access Policies & Publishing toolkit](#)
- [SCURL EDI Network: EDI toolkit](#)
- [Toolkit to foster Open Access Agreements for Smaller Independent Publishers \(cOAlitionS\)](#)
- [University of London Press launch a new Open Access in the Humanities online training course](#)
- [Library Publishing: How to Launch, Enhance, and Sustain Your Program \(ALA\)](#)

Catalogue of Criteria for Assessing the Funding Eligibility of Open Science Infrastructures

This criteria catalogue and the accompanying assessment questions were developed by a working group of KEMÖ ([Kooperation E-Medien Österreich, the Austrian Academic Library Consortium](#)). They are intended to support research institutions and organisations in the evaluation of Open Science Infrastructures. The 20 criteria outlined in the catalogue provide a structured basis for making informed decisions regarding the financial support of these infrastructures.

The assessment questions are intended to be completed by Open Science Infrastructures.

[Download the assessment questions](#)

COPIM's toolkit for running an Opening the Future programme at an academic press

This document sets out how Copim implemented the [Opening the Future](#) (OtF) model, including the documentation of challenges, resources, timetables, and activities.

It is intended as a roadmap for other presses that wish to implement an 'Opening the Future'-esque model. It is the only toolkit dedicated to flipping book publishing from closed to open (although the Information Power report due in December will likely render this incorrect).

It is now slightly out of date as many of these funding models have developed greatly since 2020. It is also not currently very user-friendly and has not been widely adopted.

[View the resource](#)

It has now been superseded by Books 6 , 7 and 8 of [Copim Compass](#).

DIAMAS Best Practices checklist for Diamond OA publishers

This self-assessment checklist from the [DIAMAS project](#) is for publishers of Diamond OA books and journals. It provides guidelines for best practice in several areas (e.g. governance, funding, editorial integrity) and provides suggestions for improvement. It also provides external links for more information to support these guidelines.

[View the checklist](#)

European University Association: The new university Open Access checklist

This checklist, produced in 2021, made recommendations for advocacy and actions to support open access implementation within universities.

These are categorised into:

- Empowering the university
- Building capacity
- Reinforcing this capacity

It also provides clear parameters, rationales, suggestions for action, and expected outcome of these actions. While this report was aimed at universities as research centres and funders, it is extremely useful for publishers regarding the possible perspectives and strategic goals of universities.

[View the checklist](#)

Experimental Publishing Compendium

The Experimental Publishing Compendium is a guide and reference for scholars, publishers, developers, librarians, and designers who want to challenge, push and redefine the shape, form and rationale of scholarly books. The compendium brings together tools, practices, and books to promote the publication of experimental scholarly works.

[Access the Compendium](#)

Focused Toolkit for Journal Editors and Publishers: Building Diversity, Equity, Inclusion, and Accessibility in Editorial Roles and Peer Review (C4DISC)

The toolkit is focused on building representation among peer reviewers and fostering equity in the actions of peer reviewers. It is also dedicated to building DEIA into core aspects of the wider editorial endeavor. While it has detailed, and in places, useful, guidance, and is very new (published May 2024) the majority of the advice is only relevant to very large and well-funded outfits with robust reporting tools, mostly with a focus on journals. It also mentions open access as a facet of equity, but suggests using transformative agreements.

[View the toolkit](#)

New University Press toolkit

An online guide from Jisc supporting and giving guidance to new university presses and library-led publishing ventures. It is a trusted and valued resource.

[View the toolkit](#)

OAPEN: OA books toolkit

This toolkit aims to help book authors to better understand open access book publishing and to increase trust in open access books. Authors can find relevant articles on open access book publishing following the research lifecycle, by browsing frequently asked questions or by searching with keywords.

In our research we broke this wide-ranging and comprehensive author-focussed tool into three sections:

- **Life Cycle** - a series of articles laid out in the 'life cycle' of a book from choosing a publisher through to publication, dissemination and reuse
- **FAQs** - a list of FAQs about OA books that link to brief answers, and also to associated Life Cycle article
- **Keywords and Glossary** - a list of frequently used terms to do with OA books, and the keywords, which is a similar (but not identical) list which links to articles in the toolkit which contain that word

The toolkit is extremely thorough, detailed, clear, comprehensive, well-referenced and useful, and should be used as the main place to point OA authors to. It is also being regularly updated and maintained, and is likely to be supported for a long time as it is at OAPEN.

[View the toolkit](#)

Open Book Collective toolkit

The Open Book Collective toolkit is for small, scholar-led OA publishers who are either setting up a press or seeking to improve its operations. It covers a broad range of aspects about setting up a press and building one up logistically and reputationally. It also provides case studies. It can be used alongside the [Jisc NUP toolkit](#).

[View the toolkit](#)

Scholarly Communication Toolkit: Open Access Policies & Publishing toolkit

This resource has also pointed to some other toolkits that could be interesting as a lot of them cover negotiating agreements from library POV. However, the authors do not personally feel qualified to assess this particular resource given it is a North American resource (other than noting it has not been updated for a few years!).

[View the toolkit](#)

SCURL EDI Network: EDI toolkit

This toolkit from the [SCURL EDI Network](#) aims to support member libraries in embedding good practice consistently across services. It is comprehensive and useful and comes at the topic from several angles - that of evaluating EDI in the workplace and recruitment, but also from policy and how to support students in the library.

The plan is to annually evaluate and update it, and the resource is very recent (from 2023). It covers the topic from a library point of view but has more widely applicable sections (e.g. on hiring policies).

It is a good toolkit - but specifically library (and UK)-focussed so does not fulfill the publisher's perspective need - overall a very good resource for EDI in libraries.

[View the toolkit](#)

Toolkit to foster Open Access Agreements for Smaller Independent Publishers (cOAlitionS)

This toolkit was developed by Information Power, commissioned by cOAlition S and ALPSP. It provides concise guidance, example licences and data templates for smaller publishers to use while negotiating agreements with libraries. It is journal-focussed, and there is [another Information Power report \(2025\)](#) which focuses on books.

[View the toolkit](#)

University of London Press launch a new Open Access in the Humanities online training course

University of London Press have [developed a new online training course on open access publishing](#) with the School of Advanced Study. The course is free and available via the School's [RESHAPED platform](#) - a new training and research community space for researchers in the Humanities.

The course offers an introduction to open access publishing for humanities researchers at all career stages, as well as students, librarians and research support staff, and provides the practical information needed to navigate today's open access landscape. It is divided into three interactive, accessible 20-30-minute modules covering what open access is; models, funding and licensing; and how to make your publications open access. It provides the practical information needed to navigate today's open access landscape. The course also includes interactive activities, knowledge checks, resource banks for further learning and videos with other experts in this space.

Explore the RESHAPED platform and the new open access course: [Open Access in the Humanities](#). You can either create an account on the platform, or you access it as a guest with no login required.

Library Publishing: How to Launch, Enhance, and Sustain Your Program (ALA)

This volume, put out in 2025 by the American Library Association, provides comprehensive and extensive guidance on how to launch, grow, and sustain library publishing programmes. It does this through detailed case studies and reflections from libraries who have managed this in different ways, and therefore provides a flexible, rather than proscriptive, set of tools and advice. While it has a focus on journals, both scholarly monographs and OERs are included. As it consists of case studies, it does not contain end to end guidance for library publishing workflows, but will certainly provide useful suggestions, caveats and other information for libraries looking to implement, grow, or attain sustainability for their publishing endeavours.

[View resource here.](#)